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# **Essentials of Management Consulting**

- The Irreducible Common Body of Knowledge Consultants Need to be Effective
- Practical Management & Leadership Tips for Executives



London Graduate School



**IMC-Nigeria  
SEMINAR PAPERS 2018/2019**

*Edited By*  
**David Iornem**

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# THE ROLE OF IMC AND ICMCI IN FOSTERING PROFESSIONALISM

By

David Iornem, FIMC. CMC

## Introduction:

This paper is based solely on policy documents of the International Council of Management Consulting Institutes (ICMCI). Such documents include the Constitution of the Council, decisions reached at its various Congresses and working Sessions, and the strategic plan of the Council.

## Purposes of the ICMCI

The purpose of ICMCI organisation is to:

1. Enhance the flow of information between the existing national certifying bodies of management consultants in order to increase the knowledge of the process, encourage assistance between institutes and improve the process of certification throughout the world
2. Elevate the standards of management consultants worldwide while increasing the acceptance of management consulting as a respected profession.
3. Encourage the networking of management consultants across national boundaries, thus, improving the free flow of information and developing a greater cooperative spirit among countries.
4. Encourage reciprocity between institutes with recognised universal standards and adherence to an International Code of Professional Conduct.

## Membership

Admission to the Institute is open to the certifying body of any country which:

1. is a legal entity and has been in existence for four year or more
2. Is the recognised national professional organisation or independent management consultants and is formally committed to maintaining the highest professional standards among its members
3. has a formal certification/registration process
4. has a Code of Professional Conduct
5. has a governing Councilor Committee prepared and empowered to affirm on behalf of its members support for the aims and objectives of ICMCI and agreement in principle to such international standards (definitions, codes, guidelines, etc) as may be agreed from time to time by the International Council.

The current standards promotion programmes of ICMCI are founded on a survey, which was conducted internationally in 1997. I will provide details.

## **CMC Standards Survey - September 1997**

### **Background**

At the ICMCI Conference in Vienna in June 1996, the results of a survey of members and associate countries, conducted by Australia, were presented. The Results illustrated the extent to which CMC has become the international standard in management consulting, but also identified interpretations of CMC among members.

As a result of the apparent discrepancies in the use and interpretation of CMC, the Vienna conference resolved to form a programme committee to work towards agreed common standards. The members of the committee were from Australia, Ireland, South Africa and the United Kingdom.

### **Findings**

Completed surveys were received from 21 countries including Nigeria. Data was not received from Malaysia, Poland or from new members i.e. Bangladesh, Germany, Indonesia, Norway and the Philippines. CMC is widely used by ICMCI members, most adopting it over the last 2 to 4 years. The table displays information on the extent of use of the CMC mark. Canada and United States of America were the first to use the CMC however. Among the countries using CMC, 14 still do not have a specific policy covering its use and application.

CMC has trademarked or has been given an equivalent form of registered protection in four countries, as well as registration applications pending in a further two countries.

### **Criteria For Initial Attainment of CMC**

All member countries, apart from Malaysia which is currently reviewing the introduction of CMC, require a university degree or equivalent educational qualification. In the case of Australia, Canada, Denmark, France, Ireland, Switzerland and the United Kingdom, individuals without a degree, but with at least eight years management consulting, may be considered for initial membership of their Institutes. The experience is that candidates requesting consideration on these grounds are few, and must have exceptionally strong claims to convince chapter membership committees of their ability to meet the admission standards.

All countries require the individual to have prior management consulting experience to become a CMC. In most cases this is set at three years, but India, Netherlands and Switzerland .require five years and Austria two years. Full time consulting is defined by most countries as between 800 to ] 200 client related hours per year.

There is wide variation for determining CMC admission, with a preference for peer interviews. There are only three countries using examination alone, seven using an interview alone and a further six using both examination and interview. The most usual additional requirements for attaining CMC are client references' and assignment summaries. India and Singapore require the consultant to be of a certain age.

The USA uses aggregate points system, based on education, work experience assignment summaries, and professional activities, to determine eligibility to attend a CMC ethics examination and certification panel interview.

There are uneven levels of activity in relation to the promotion of CMC. The survey revealed that all countries with CMC regularly review their admission processes, some quite regular, others on an ad hoc basis.

#### **CMC Maintenance Processes**

The survey indicated that some countries, do not actively promote the CMC mark or brand name. Austria, Canada, France and Malaysia have legislation or regulatory framework to govern professional registration, including the management consulting profession.

Australia appears to be the only country which links CMC to a practicing certificate and requires the individual to meet certain practice hours and continuing education requirements each year to maintain the certificate. Most other member countries indicated in survey response that their CMC license is basically indefinite, once issued. In Switzerland, there is a recertification for CMC's every three years.

Canada and Austria, use the CMC concept to signify competency. In Australia, individuals-are graded permanently as CMC, but must reapply annually for a practicing certificate, which is only issued if they have practised full time as a management consultant in the preceding year, undertaken a specified amount of approved continuing education and remained financial members of their local state chapter. If they fail to meet these criteria, they are recorded on the membership database as "non-practising CMC".

#### **Summary**

It is evident from the data that most countries and associates of ICMCI have adopted CMC as the standard for identifying experienced individuals, practising as professional management consultants, who are members of their country's institute.

There is significant variation in the processes adopted across countries to assess individuals for attainment of CMC. This ranges from the situation where anyone who is a member of an institute is entitled to use CMC, such as Ireland, through to the USA with an aggregate points system covering education, experience and professional development, as well as an ethics examination and peer interview.

## **Conclusions**

There are a number of conclusions which may be drawn from the survey. These are:

1. CMC is actively accepted and used by most ICMCI members as an international standard to signify experienced management consultants.
2. There are policy statements in only six countries to reinforce CMC and these are generally based on ICMCI policy.
3. The criteria for attainment of CMC have several common elements, such as minimum education and experience, but vary in terms of additional criteria.
4. There is clearly no agreed approach to use or content of exams, peer interview panels, client references or assignment summaries to assess CMCs. There is the very real prospect of a parochial bias for admission as a CMC, in the absence of an agreed approach for assessment.
5. There is an unresolved dichotomy between those countries promoting a strong regulatory framework to control the consulting profession, versus others who prefer to rely on the marketplace as the regulator.
6. There are few guide lines and considerable scope for improvement, in the use and promotion of the CMC mark and brand. To ensure international protection, the majority of countries need to trademark or register the CMC mark.

CMC tends to be used as a grade of membership, rather than as an indicator of competency. Scope exists to reinforce the idea that CMC is a mark of competency, by approaches such as the annual issuing of a practicing certificate or license, based on undertaking continuing education and minimum consulting practice hours.

## **NEW DIRECTIONS**

Arising from the above findings and conclusions the ICMCI took certain decisions at the 1997 Cape Town Congress designed to usher in a regime of common approaches and practices that can increase adherence to common standards. These are:

1. That with immediate effect, the Governing Boards of member Institutes should adopt the ICMCI Code of Ethics and integrate same into the Codes of their respective national Institutes. All member Institutes have already complied.

2. To develop and adopt a Uniform Body of Knowledge (UBK). A lot of work has been done in this area. A UBK Committee was set up at the Cape Town Congress. It submitted a report at the Go a Working Session in November 1998. The report has been adopted for implementation.
3. Minimum standards have been set for the CMC designation. A degree or equivalent level of training plus suitable experience is required. Exceptionally, consultants without a degree but with minimum of 8 years in consulting position may be admitted.
4. Only one single national Institute in each country is accredited to grant the CMC. The IMC is the body so accredited in Nigeria.
5. National Institutes are to seek legal protection through legislation or copy right registration of the CMC mark. The IMC is nearly there. Our application to register the CMC as a Trade Mark has been approved.
6. To increase the global significance, recognition and visibility of the CMC qualification, the ICMCI is spearheading the formation of consulting Institutes in countries that do not have one. The IMC of Nigeria is mentoring the initiatives in Tanzania, Kenya, Sierra Leone, Zambia and Honk Kong.
7. Continuing education has been adopted by member Institutes for revalidation of the CMC qualification. Most members revalidate after 12 months. Others have variations ranging from 2 to 3 years. The plan is to get all members to adopt ] 2 months.
8. Minimum of 800 consulting hours has been adopted by member Institutes for revalidation as CMC.

### **What should a Consultant be Competent in?**

Outlined here are the types of elements that consultants should be competent in. Tracing the stages of the client-consultant relationship is a useful guideline as to the generic path that assessments follow and. It provides the most inclusive scenario while identifying the characteristics of required actions and competence benchmarks.

Clearly, certain projects may not require (e.g.) implementation, and others may not require Phase 1, or 2, due to the nature of repeat business.

1. The client-consultant relationship

#### **Phase 1: *Prospecting and Approach***

- marketing of services
- exploring opportunities
- impressing from first contact

Phase 2: *Proposal and Entry*

- Understanding the client
- recognising a client need
- clarifying the client need
- exploring potential for success of project
- providing estimates and billing strategy.

Phase 3: *Performance- Strategy for Solutions*

- selecting method of intervention
- isolating the problem
- understand scope of problem
- exploring client's readiness for change
- hypotheating
- interviewing
- exercising fact-finding methods
- applying analytical methods
- applying diagnostic tools
- identifying benefits
- dealing with client managers

Phase 4: *Implementation and Exit*

- applying solution development methods
- validating recommendations
- implementing
- relating back to expectations
- applying contingency plans
- evaluating
- closing

Phase 5: *Post-Engagement Activities*

- maintaining the relationship

**2. Effectiveness in Consulting diagnostic ability**

- solution and implementation
- general and specialised knowledge as defined by PESTLE and management
- communication skills
- managerial skills marketing and selling skills



## **The New Uniform Body of Knowledge**

Based on the prescriptions of knowledge areas adjudged necessary for consultants, a new Uniform Body Knowledge has been developed by ICMCI.

ii) The following arc managerial processes that consultant should be aware of to varying degrees of depth and breath degrees depending on the project. Projects may be highly specific requiring a specialist's perspective, but it may also be highly strategic in nature, in which case broader knowledge of these items would be beneficial. Some may even apply to the management of consulting work specifically:

**1. Organisation Analysis:**

- understanding organisational structures
- measuring organisational performance
- evaluating mission statement and comparing with core values and purpose

**2. Organisational Development:**

- establishing need for change team building
- T-groups
- force-field analysis

**3. Project/Process Management:**

- client focus
- simple vs. complex teams
- identifying intended outcomes
- identifying expected outcomes
- time management
- scheduling techniques
- setting milestones
- maintaining documentation
- reporting
- managing the end of the project: closure
- Management Information Systems
- budgeting and financial control

**4. Change Management:**

- understanding the nature of change
- identifying change
  - internalising change
  - application of different approaches
  - leadership
  - innovation
  - experimentation
  - openness

- the change agent
- communicating

## **5. Strategy**

- innovation
- regeneration
- directing
- leading
- 're-inventing the future'

### **Specialist Technical/Professional Competence Depth**

Specialist competencies are important because they reflect the fragmented consulting market that exists today. Specialist competencies are a consultant's entry point upon which they can build professional depth. Consultants range from the stereotypical McKinseyite, with a general management approach, to the specialist IT consultant or senior executive facilitator and coach. They all require core competencies that form a part of every consultant worth his/her salt, but specialist approaches require specialist knowledge without which the client will remain unimpressed. This is also a growing trend, as clients are becoming more aware and demanding of what they purchase. They expect the firm to the training, not them: as would be the case when buying a consulting team with several junior constituents. The types of specialisation hereunder can be broadly categorised as either functional or sectoral.

#### **Functional**

- IT
- HR
- Strategic planning · Production
- Marketing

#### **Sectoral**

- Financial
- Governmental · Charitable
- Public
- Private
- Internal

### **Underlying understanding of PESTLE**

Knowledge of the political, economic, social, technological legal and environmental situation is imperative for a successful consulting intervention. These are macro-forces

that act upon an organisation and shape its strategic and operational approaches in order to be successful. This implies that these forces will also shape how the consultant will have to intervene to help the client-organisation achieve its success.

**1. Political:**

- national
- organisational
- industrial relations
- influencing and lobbying

**2. Economic:**

- macro economic
- factors micro economic
- factors market wealth
- resource allocation

**3. Social:**

- national culture
- organisational culture
- ethical culture
- business ethics
- inter and intra personal capabilities

**4. Technological:**

- awareness
- needs, wants and possibilities
- infrastructure communications

**5. Legal:**

- legislation
- business regulations
- contract and liability
- insurance
- intellectual property rights
- taxation
- anti-trust laws

**6. Environmental:**

- environmental law
- environmental responsibility

## **Underlying ACT abilities**

Acting, communicating and thinking are inherent personal abilities, or competencies, that we have at our disposal, but that a consultant must strive to refine through experience.

### **1. Acting:**

- professional attitude/behaviour
- professional conduct/ethics
- dealing with client culture
- managing conflict
- motivating and developing people leading
- facilitating
- mentoring
- coaching
- selecting appropriate role

### **2. Communicating:**

- written communications
- oral communications
- using available technology
- preparing proposals
- appropriate reporting
- enhanced presentations

### **3. Thinking:**

- 'empathising'
- lateral thinking
- 'seeing the end from the beginning'
- contingency planning
- flexible approaches

# Understanding the Consultancy Process

## What is consultancy?

The Institute of Management Consultancy (IMC) defines management consultancy as *'the provision to management of objective advice and assistance relating to the strategy, structure, management and operations of an organisation in pursuit of its long-term purposes and objectives. Such assistance may include the identification of options with recommendations; the provision of an additional resource and/or the implementation of solutions'*

Management consultants are *'those organisations and/or individuals that participate in the process of management consultancy within a framework of appropriate and relevant professional disciplines and ethics designed for the activity of management consultancy.'*

Typically, a management consultant will be engaged in providing change demonstrating:

- change management skills
- technical and business knowledge
- business understanding '
- ownership, management and delivery of solutions to clients
- project delivery and risk management
- excellent interpersonal skills
- ability to transfer skills to others
- creative and analytical thinking
- adherence to a code of conduct and ethical guidelines

The IMC has developed a management consultancy competence framework, which presents the knowledge, skills and behaviours that define today's management consultant, all of which are supported by a code of conduct and professional ethics. It sets out three broad groupings of competences:

**Market Capability and Knowledge:** The application of fact-based knowledge, bringing together the combination of technical skills, business understanding, sector insight and external awareness.

**Consulting Competence** defines the core consultancy skills, tools, and techniques which are essential in delivering consultancy services.

**Professional Behaviours** are the entry-level professional behaviours and attitudes which act as 'enablers' in achieving market capability and Consulting competence.

### **The Consultant's Role in the Process**

According Peter Block, a consultant is *a person In a position to have some influence over an individual or group, or an organisation, but who has no direct power to make changes or implement programmes'.*

Sometimes a consultant is asked to take responsibility for implementation - in this case they are acting as a surrogate manager. It can be a legitimate activity, but strictly it is not consulting.

In its most general use, consultation describes any action taken with a system of which the consultant is not a part. Change comes in two varieties. At one level, we consult to create change in the line organisation of a structural, policy, or procedural nature; the second kind of change is the end result that one person or many people in the line organisation have learned something new.

Leverage and impact are what consultants want and what we get paid for. Leverage and impact mean that our expertise is used and our recommendations are accepted.

Each consulting project, however short, goes through five phases:

- **Entry and contracting**

This is a critical stage of any project, to do with the initial contact with the client, including exploring the problem, deciding whether the consultant is the right person to work on this issue, both the client's and the consultant's expectations and how to get started.

- **Discovery and dialogue**

Consultants need to come up with their own sense of the problem, and help the client to do the same; who is going to be involved in defining the problem, what methods will be used, what kind of data should be collected, how long will it take?

- **Feedback and decision to act**

Reporting the data collection and analysis, including setting ultimate goals for the project and selecting the best action steps or changes.

- **Engagement and implementation**

In many cases the implementation may fall entirely on the line organisation, though the consultant may also be involved.

- **Extension, recycle or termination**

Evaluation of what happened in the previous phase. Sometimes it is not until after some implementation occurs that a clear picture of the real problem emerges. In this case the process recycles and a new contract needs to be

Consultants should be trained to apply their technical competence through this process, using the powerful change processes of NeuroLinguistic Programming. In addition, they have facilitative, coaching and training skills to support a comprehensive organisational change process.



# Writing Proposals

The first point to realise about a proposal is that, it is a marketing tool designed to enable you to get the job.

## Procedure

1. Describe your business.
2. Paraphrase key points (information) gathered at the briefing meetings.
3. State what you intend to do for the client.
4. Indicate anticipated results and potential benefits the client will gain as a consequence of the engagement.
5. Outline your approach (methodology).
6. State your qualifications (especially for the type of assignment in view, citing similar previous jobs).
7. Use any possible persuasive techniques to get the client to accept your proposal.
8. Use simple English

## Contents of a Proposal

1. Table of Contents
2. Executive Summary
3. Background information
4. Purposes
5. Objectives
6. Approach (Methodology)
7. Deliverable (Key areas in which services will be provided including what the client will have at the end of the day).
8. Pricing
9. Progress Checks
10. Qualifications
11. Resources
12. Responsibilities – yours and the client's

## THE BUSINESS PLAN STRUCTURE

- **Title page:** Title or heading of the plan and brief description if required, author, date, company/organisation if applicable, details of circulation and confidentiality.
- **Contents page:** A list of contents (basically the sections listed here, starting with the introduction page) showing page numbers, plus a list of appendices or addendums (added reference material at the back of the document) allowing the reader to find what they need and navigate the document easily, and to refer others to particular items and page numbers when reviewing or querying.
- **Executive summary page:** Optional and usually beneficial, this should normally be no more than a page long (or it's not an executive summary) – the key points of the whole plan including conclusions, recommendations, actions, financial returns on investment, etc., clearly readable in a few minutes.
- **Main body of plan:** Sections and headings as required see template below.
- **Acknowledgements and bibliography/reference sources:** if relevant (no required normally for very large formal plans)
- **Appendices:** appendices or addendums – additional detailed reference material, examples, statistics, spreadsheets, etc., for reference and not central to the main presentation of your plan.

### BUSINESS PLANS – MAIN BODY SECTIONS EXAMPLES TEMPLATE

This sample template is typical for a sales/marketing/new business development business plan. (a business plan for a more complex project such as an international joint-venture, or the formation of a new company including manufacturing plant or other overhead activities would need to include relevant information and financials about the overheads and resources concerned, and the financials would need to show costs and profits more like a fully developed profit and lost account, with cashflow projections, balance sheet, etc.) **Where appropriate refer to your position regarding corporate ethics and social responsibility. While these aspects are not mechanism within the plan, they are crucial reference point.**

1. Define your market – sector(s) and segment(s) definitions.
2. Quantify your market (overview only) – size, segmentation, relevant statistics, values, numbers (locations, people/user, etc) – make this relevant to your business.
3. Explain your market(s) – sector trends, e.g., growth, legislation, seasonality, PEST factors where relevant, refer to Ansoff matrix, show the strategic business drivers within sector and segments, purchasing mechanisms, processes, restrictions – what are the factors that determine customers' priorities and needs – this is a logical place to refer to ethics and CSR (corporate social responsibility)

4. Explain your existing business – your current business according to sector, product/services, quantities, values, distributor, etc.
5. Analyse your existing customer spread by customer type, values and products/services including major accounts (the 'Pareto Principle' or the '80:20 rule' often applies here, e.g., 80% of your business comes from 20% of your customers)
6. Explain your products and services – refer to Boston matrix **and especially your strategic propositions** ( what these propositions will do for your customer) including your USP's and UPS's (see sales training section and acronyms)
7. Explain your routes to market, gatekeepers, influencers and strategic partners – the other organisations'/individuals you will work with to develop your market, including what's in it for them', commissions, endorsements, accreditations, approvals, licenses, etc.
8. Case studies and track record – the credibility, evidence and proof that your propositions and strategic partnerships work.
9. Competitor analysis, e.g. SWOT analysis of your own business compared to SWOT analysis of each competitor.
10. Sales/marketing /business plan (1 year min) showing sales and margins by product/service stream, mix, values, segment, 'distributor', etc; whatever is relevant, phased monthly, in as much as you need. **This should be on a spread sheet**, with as many different sheets as necessary to quantify relevant inputs and outputs.
11. List your strategic **actions** (marketing campaigns, sales activities, advertising, etc) that will deliver the above, with cost and return on investment activity.

Tip: if the business plan concerns an existing activity, use the previous year's sales/business analysis as the basis for the next year's sales/business plan. Adapt as necessary according to your new strategic plans.

## **Preparing a business plan and budget**

The annual business plan and budget process is a key part of running a business successfully and achieving a strategy. It provides a discipline for the management to thoroughly review progress and to set objectives - and for the directors/holding company to commit to supporting the budget and investment plans.

A business plan is necessary for three primary reasons:

- It gives business owners a current assessment of the business as well as a roadmap for the future.
- It helps a business grow, both organically and through outside funding.
- It is essential to have an up to date business plan in order to secure financing, ranging from an overdraft facility or bank loan to venture capital funding.

The business plan/budget is a living document that should be continuously reviewed in light of the business environment and actual performance. In addition there should be formal reviews on a quarterly basis. This enables the directors to oversee business performance.

Business planning should operate on a rolling five years, while the budget is likely to be required only for the coming financial year.

### **When to use outside help**

For a business plan to be effective it should be owned by those who will have to implement it. So, it cannot just be delegated to a consultant. But an experienced business facilitator can add value to the process, whilst ensuring that ownership is in-house.

He can:

- guide managers/directors through the process . draw out strategies from the participants
- capture the information
- record it in a structured manner.

The words of the business plan are important; they explore issues and make commitments to action. A facilitator can ensure that they are carefully chosen and understood. The figures in the budget merely represent an interpretation of the results of those actions. But the spreadsheets that lead to the figures will identify the consequences of decisions - the process is iterative until a plan and budget are reached that can be approved by the directors.

### **Objectives**

The objectives of the business plan are first to develop and communicate a plan of action that will achieve the company's strategic objective. Then to provide a means of monitoring progress towards that objective and of stimulating alternative action if the objective is unlikely to be met by the original plan. These cannot be achieved unless the plan defines the strategic objective and includes benchmarks or performance measures at key stages during the year.

The plan should include reviews of internal resources and the external environment, and define measures of quality and customer satisfaction.

The plan is likely to focus on:

- revenue - income, direct costs and overheads
- capital - expenditure, depreciation

Financial measures will include return on investment and margin.

Targets for growth may well include turnover - but in this case margin must also be monitored.

Don't allow a focus on the figures to confuse the significance of the words. It is only actions - described by the words - that generate revenue.

### **The planning process**

The planning process is a valuable and exciting exercise that can be a major contributor to team building and a means of developing ownership/commitment to the plan. Involve people, it should end up as "our plan" not "their plan imposed on us".

There are various exercises that can be helpful in the planning process:

- Analysis of current year financial results
- SWOT analysis - strengths, weaknesses, opportunities and Threats
- PEST analysis - political, economic, social and technological
- Balanced scorecard - analysis of the impact of achieving objectives from a financial perspective, a customer perspective and an internal perspective, and on innovation and learning, together with identification of critical success factors and performance measures.
- Brainstorming -for alternative scenarios, opportunities, strategies

If the company provides different services or operates in different niche markets these exercises should be checked for each.

For a business plan/budget exercise you should focus on:

- Review of current year as a basis for making decisions about the future
- Objectives and strategy

- Action plan and benchmarks
- Resources needed
- Results anticipated

### **Outline of a business plan**

A business plan is a tool for decision making - remember this and remember who it is written for -then design it to suit.

A basic business plan has several key elements: Executive summary

- Description of the business
- Description of the target market
- Analysis of the competition
- Description of the management team
- Marketing strategy

As a guide, a typical business plan would have the following structure:

- Name of the business
- Address of the business
- Nature of the business
- People in the business
- Marketing and sales strategy
- Profit and loss forecasts
- Cash flow forecasts
- Capital expenditure plans
- Stock policy
- Funds required - financial base
- Management information systems
- Special factors
- Action plan - key decisions - target dates

### **Conclusion**

Remember, your business plan is the tool that you will use to manage your future and on which your performance will be judged. It will be the basis on which you negotiate for resources.

It should be imaginative, challenging and achievable.

Preparing it will be' team effort is often rewarding.

## MARKETING TIPS

**Marketing:** The business activity involving identifying, anticipating and satisfying your clients needs profitably.

The **Business plan** is in effect basically a **marketing plan**.

- Conduct Market Research
- Establish marketing objectives
- Segment the market
- Define your product or services
- Create a schedule

**Market research** is critical in any marketing programme: Is there a market? What is the size? Where is the market? Who and where are competitors? What is the current pricing practice? What is the best way to package the service?

**Marketing objectives** should be:

**S. M. A. R. T.**

**S** = Specific

**M** = Measurable

**A** = Attainable and Aligned

**R** = Result oriented and Realistic

**T** = Time-based

Objectives could include areas such as:

- Share of the market
- Market Penetration
- Market Visibility
- Size of database
- Number of Newsletters

**Market Segmentation** could cover industry types, geographical area.

**Promotional schemes** could cover:

- Advertising
- Public Relations

- Giving speeches
- Marketing communications
- Newsletters
- Trade shows and exhibitions
- Authoring books, articles
- Webpages

### **The 8 Ps of Service Marketing**

When marketing physical products like Omo, Lux, Peugeot Cars, etc, marketers have traditionally used the 4 Ps known as:

1. Product
2. Price
3. Place
4. Promotion

But marketing services poses additional challenges in marketing. This has led to the introduction of four additional Ps to tackle the special aspects of services.

These are

1. People
2. Process
3. Physical Evidence
4. Promise



## **IMPORTANCE OF NETWORKING**

Consulting is a relationship-dominated selling activity. To survive as a consultant you need to create personal and professional networks (Susan Nash, 2000:18). The numerous networks which a consultant builds provide both a marketing base and a source of support. Such networks are critical for building an on-going practice. The consultant also needs to network with fellow consultants to provide help for large projects or to fill in for you when necessary.

### **Sources of Networks**

1. Friends
2. Family
3. Colleagues, Past and Present
4. University Alumni/Secondary
5. Trade organisations
6. Neighbours
7. Drinking or eating places
8. Sports clubs/other clubs
9. People you meet when travelling
10. Prospects from presentations
11. Contacts from exhibitions and Conferences
12. Vendors/Suppliers
13. Previous customers
14. Workshop places

### **Criteria**

While preparing the list of possible people you want to network with, ensure that they satisfy the following conditions as far as it is possible:

1. You should personally know the person you are putting on the list.
2. You respect the person.
3. The person would probably like to hear from you.
4. Ensure that there is a mutual exchange of benefits.
5. The person you contact would remember you.

## **HOW TO SET THE FEE**

Being a discussion paper by Professor David Iornem, FIMC, CMC, Director General, Institute of Management Consultants at IMC Round-Table Discussion.

### **Consultants' Dilemma**

What to charge the client for the services which we offer as consultants has often been a problem for both beginners as well as old timers in the profession.

Bermont (1978:63) highlighted the dilemma of management consultants regarding fee arrangement in the following words:

Charge too much and you won't be working. Charge too little and the prospective Client will look elsewhere thinking you couldn't be very good nor your advice worthwhile. So what's the right price?

### **Objectives of this Discussion**

During this short presentation. I intend to stimulate the participants of the Round-Table Discussion to come up with practical ideas that can help colleagues in the profession. This is in helping with the goals of the Institute of Management Consultants (IMC). The Institute seeks to create, maintain and extend high standards of consulting practice through the extension of knowledge, through the sharing of experiences among practitioners.

Specifically, one hopes that at the end of this short presentation, participants should be able to:

- a. Identify factors affecting fees charged by the consultant
- b. Calculate a Per Diem Rate (PDR)
- c. List the various fee options (methods) available to consultants.
- d. Acquire some practical ideas (tips) on fixing the fee

### **Factors Affecting the Fee**

When a consultant sets out to determine what to charge his client for a given service, he takes the following factors into consideration:

- a. What he ought to get as a salary if he were working for someone else, i.e. his personal worth. This consideration is dominant especially in the case of a “singleton”.
- b. Employee benefits – what you are paying your staff
- c. Your overheads
- d. Your profit
- e. What competitors are doing
- f. The economic Climate
- g. Level of bad debts
- h. Delayed payments
- i.. Fairness to your clients.
- j. What the market can accept.

### **Calculating What to Charge Per Day**

Sometimes, the practice acceptable to the client is that of paying the consultant on a daily basis. This is called the Per Diem Rate (PDR). In practice, this works out as the combination of all factors affecting the fee discussed earlier. There are approximately 200 working days per year. If you estimate your total operating costs to be for example one million naira, you simply divide this by 200 and add what you consider to be your acceptable daily pay to it. That becomes 'the Per Diem Rate for the job of the client.

### **Fee Arrangement Methods in Practice**

There are several fee charging methods available in the consulting industry. You should note that clients have strong preferences for certain methods. Therefore, a blind (blank) application of any method could be met with resistant and consequent rejection of your service. In choosing which method to apply, watch what the client prefers. These are the various methods available:

- 1. Fixed Fee Contract
- 2. Fixed fee plus costs
- 3. Per Diem Rates
- 4. Hourly rates
- 5. Cost re-imbursement plus fee
- 6. Contingency fee
- 7. Percentage fee
- 8. Value of assignment fee

9. Bonus and Penalty fee
10. Retainer fee
11. Equity fee
12. Fee payment in kind
13. Deferred fee payment
14. Bracket (upper limit) fee

These may be a variation of any of the methods in existence. The list cannot be exhausted.

### **Practical Tips on Pricing Consultancy Services**

1. Know your client's upper limit. What is the budget?
2. Know the going rate, i.e. the average of what most consultants are charging for similar services.
3. Know your lower limit, which represents your actual costs. It is the bottom line below which you can go.
4. Use your influence to find out the budget before quoting. If the client hasn't a budget or would not reveal it, then quote a high fee.
5. Do some follow-up on jobs you quoted and lost. The information you gather can help you in the practice.
6. If your operating costs are high, for whatever reason, I then always go for the up per range priced work.

I have tried to be as brief as one possibly can in as short a time as we have for this Round-Table discussion. I hope I have succeeded in highlighting the key issues and, thrown light on this difficult problem, which consultants have to confront one time or the other in the course of their practice

### **Reference:**

Bermont, H. (1978), *How to Become a Successful Consultant in Your Own Field*, Washington: Bermont Books.

# Hiring a consultant

The Institute of Management Consultancy has produced some guidelines for this purpose. These "ten golden rules" are not prescriptive, but they should guide you towards making the most informed decisions resulting in successful completion of the project.

## **1. Clearly define the objectives that you hope to achieve.**

- Describe the job you want done and specify the things you expect from the assignment.
- Understand precisely how you expect your business will benefit from the work.
- Decide on the timescale, scope and any constraints on the assignment.
- Clarify your own role, which key staff will be involved, and how their time will be made available.

## **2. Consult with others in your organisation to agree those objectives.**

- Consult with appropriate fellow directors and managers on the nature of the problem.
- Jointly define your specific needs for the expertise you want. Is it a systems, human or skills problem?
- You may decide that you require regular "hand holding" discussions or counselling sessions with the management consultant rather than a defined assignment. Many clients obtain considerable value from scheduling assistance in this way - but make sure you still have a written fee quote and terms of reference.

## **3. Short-list no more than three consultants, and ask them to provide written proposals.**

- Make sure you only ask consultants to quote for the work who are qualified to carry it out.
- Potential consultants will be happy to send you basic information about themselves and talk with you about your needs, without charge.

Invite consultancies to submit written proposals, which should include:

- Their understanding of the problem
- The brief
- Names and CVs of the consultant(s) who will do the work
- Experience of the firm
- References
- Other support provided by the firm
- Work plan and timeshare - Reports and/or systems that will be supplied to you

- Fees, expenses and schedules of payment
- The inputs required from you

#### **4. Brief the consultants properly.**

- Prepare a concise brief which clearly defines the objectives, scope, timescale, reporting procedure and constraints of the project and agree it with others in your organisation who will have an influence on the outcome of the project.
- Remember that the cheapest quote will not necessarily give the best value for money and the fees of your preferred consultant(s) may be negotiable.

#### **5. See the individual consultant who will do the job and make sure that the 'chemistry' is right.**

- Successful consultancy requires goodwill in human communications. Meet the consultants who will be doing the job and brief them well, using the written brief and any background information that you or they think necessary.
- Talk through your chosen proposal with the consultant before making a final decision to ensure that you have any concerns answered. If you are not happy with any aspects of the proposal do not feel pressured into accepting them. Continue discussions with the consultant until full agreement on the proposal can be reached.
- Select the firm or individual that you feel has the best qualifications and experience and who you feel you can work with comfortably.

#### **6. Ask for references from the chosen consultant(s) and follow them up.**

- Ask the firm or individual chosen for names or written references from former clients in order to verify the consultants' suitability for the assignment.

#### **7. Review and agree a written contract before the assignment starts.**

#### **8. Be involved and in touch during the assignment.**

- Using consultants effectively demands a commitment of time as well as money by clients.
- Remember that you must keep in touch with the progress of the assignment if you are to get the most from it. Consultants are likely to be most cost-effective when working to an agreed programme and timescale. Make sure there are regular progress meetings and that the consultant keeps you fully briefed on progress against the programme.
- To implement the recommendations it is often most cost effective to involve the consultant(s) together with your management.

- If you and your staff need to provide input, make sure that you do it within the agreed timescale. Extra costs may be incurred if you hold up the progress of the assignment. Consultancy requires an investment not only in fees but also in client time.
- Assignments are usually most effective when the work is done on the client's premises. Make sure you can provide suitable office space and administrative support for the consultants.
- You should aim to involve your staff in the assignment as early as possible so that they partly "own" the recommendations and have an interest in the results.
- Assignments are often most effective when run by a joint team of consultants and staff and when the contents of the consultant's report are agreed with the staff at a progress meeting.

#### **9. Ensure that the consultant does not save surprises for the final report.**

- The consultant's report is often his or her most tangible 'deliverable'; but it must be in a format which is beneficial to you. If necessary, ask the consultant to produce a draft report so that you can discuss findings and recommendations with some of your colleagues before the final report is produced.
- The final report should contain no surprises. If there are very confidential or contentious issues, ask for these to be put into a private letter rather than in the report itself. Make sure the report is written in a way you and your staff can understand and use. Tell the consultant if you are not happy with it.
- Ask the consultant to make a presentation to you and your colleagues, if this will help discussion on its conclusions.
- You should note, however, that some assignments will not result in a written report. If this is the case, make sure you understand what the deliverable will be before the assignment starts.

#### **10. Implement the recommendations and involve your management as well as the consultant.**

- You may need to make arrangements for the management consultant to help with the implementation. This can be done cost-effectively by involving the consultant in regular progress meetings. Get a written fee quotation and proposal for any implementation work, even if it follows directly from an assignment.

### **Consulting skills**

Consultants need three skills to do a good job:

**Technical skills** - the foundation of consulting skills is some expertise in a specific discipline

- Engineering
- Project management
- Planning
- Marketing
- Manufacturing
- Personnel/Human resources
- Finance
- Systems analysis

**Interpersonal skills** - necessary in all situations

- Assertiveness
- Supportiveness
- Confrontation
- Listening
- Management style
- Group process

**Consulting skills** - requirements of each consulting phase

- Contracting
  - Negotiating wants
  - Coping with mixed motivation
  - Dealing with concerns about exposure and the loss of control
  - Doing triangular and rectangular contracting

Discovery

- Surfacing layers of analysis
- Dealing with political climate
- Resisting the urge for complete data
- Seeing the interview as an intervention

Feedback

- Funneling data
- Identifying and working with different forms of resistance
- Presenting personal and organisational data

Decision

- Running group meetings
- Focusing on here and now choices
- Not taking it personally



## WHAT YOU MUST KNOW ABOUT CONSULTING CONTRACTS

### Sample Consulting Contract Agreement

\_\_\_\_\_, 20\_\_

AGREEMENT made \_\_\_\_\_, between \_\_\_\_\_,

date

name of client

With principal offices at \_\_\_\_\_ hereinafter called

client's address

"Client" and \_\_\_\_\_ of \_\_\_\_\_ hereinafter called "Consultant".

name of consultant

consultant's address

1. **Services.** Consultant as an independent contractor, agrees to perform, during the term of this Agreement, the following services: \_\_\_\_\_

\_\_\_\_\_

2. **Products.** The term "Products" shall mean the client' \_\_\_\_\_

\_\_\_\_\_

3. **Compensation**

- (a) Client shall pay Consultant at the rate of \_\_\_\_\_ per hour for each hour that Consultant shall perform services during the term of this Agreement; provided that the number of hours does not exceed \_\_\_\_\_ without the written consent of Client.

- (b) In addition to the hourly compensation provided herein, client agrees to pay Consultant ~~\$~~ \_\_\_\_\_ under the following conditions: \_\_\_\_\_

\_\_\_\_\_

4. **Term.** The initial term of this Agreement shall commence on the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_, and end on the last day of \_\_\_\_\_, 20\_\_\_\_\_, provided however that either party may terminate this Agreement at any time during the initial term of any extension term by giving the other party \_\_\_\_\_ days' notice in writing.

This Agreement may be extended beyond the initial term or any extension only by the written agreement of both parties prior to the expiration of the initial term or any extension.

5. **Designation of Duties.** Consultant shall receive his requests for services to be performed from

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Client's name

title

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company and address

6. **Restrictive Covenant.** During the term of this Agreement, consultant shall not make his services available to any competitor of Client in the specific field in which he is performing services for Client.
7. **Indemnity and Insurance.** Consultant shall indemnify and hold harmless client, its officers, and employees against all losses, claims, liabilities, damages and expenses of any nature directly or indirectly arising out of or as a result of any act of omission by Consultant, its employees, agents, or subcontractors in the performance of this agreement.
- If Consultant uses, or intends to use, a personal automobile in the performance of this Agreement, Consultant shall maintain throughout the term of this Agreement automobile liability insurance in accordance with the law of the state of \_\_\_\_\_ and not less than \_\_\_\_\_.
8. **Patent Rights.** Consultant agrees during the term of this agreement and fore a period of 12 months after the determination of this Agreement, to assign to Client, its successors, assigns, or nominees all right, title and interest in and to all inventions, improvements, copyrightable material, techniques, and designs made or conceived by him solely or jointly with others, relating to products, in the performance of this Agreement, together with all United States and foreign patents and copyrights which may have been obtained thereon, and at Client's request and expense, will execute and deliver all proper assignments thereof.
9. **Confidentiality.** Consultant shall not disclose, publish, or authorize others to publish design data, drawings, specifications, reports, or other information pertaining to the work assigned to him by Client without the prior written approval of Client. Upon the expiration or sooner termination of this Agreement, Consultant agrees to return to Client all drawings, specifications, data and other material obtained by consultant from client, or developed by Consultant, in connection with the performance of this agreement.
10. **Reimbursable Expenses.** The following expenses will be billed in addition to compensation:
- (a) Travel expenses necessary in order to perform services required by the Agreement. Use of personal automobile will be billed at \_\_\_\_\_ per km.
  - (b) Telephone, telegraph, and telex charges
  - (c) Computer charges
  - (d) Printing and reproduction
  - (e) Other expenses resulting directly from performance of services in the agreement.

11. **Warranty.** Consultant services will be performed in accordance with generally and currently accepted consulting principles and practices. This warranty is in lieu of all other warranties either expressed or implied.

12. **Limitation of Consultant Liability.** Client agrees to limit any and all liability or claim for damages, cost of defence, or expenses against Consultant to a sum not to exceed ₦\_\_\_\_\_, or the total amount of compensation, whichever is less, on account of any error, omission, or negligence.

13. **Payment terms.** Terms of payment are as follows: ₦\_\_\_\_\_ due on the signing of Agreement and ₦\_\_\_\_\_ due \_\_\_\_\_, 20 \_\_. ₦\_\_\_\_\_ due on delivery of \_\_\_\_\_. A \_\_\_\_\_ % per month charge will be added to all delinquent accounts. In the event Consultant shall be successful in any suit for non-payment, Consultant shall be entitled to recover reasonable legal costs and expenses for bringing and maintaining this suit as a part of damages.

IN WITNESS WHEREOF, the parties have signed this Agreement.

\_\_\_\_\_

Consultant

\_\_\_\_\_

Client

# WHAT YOU MUST KNOW ABOUT CONSULTING CONTRACTS

## COMPONENTS OF A CONTRACT

1. Preamble (Stating the project and the contracting parties)
2. Offer
3. Acceptance
4. Project Goals
5. Project Methodology
6. Project Scope
7. Consultants Tasks (Responsibility)
8. Clients Tasks (Responsibility)
9. Time Frame
10. Assumptions on Social Conditions
11. Consideration (Fees)
12. Refundable Expenses
13. Liquidated Damages
14. Confidentiality Clause
15. Conflict of Interest
16. Subcontracting
17. Reporting
18. Currency of payment for international contracts
19. Arbitration in case of disagreement
20. Expiration of contract
21. Signatures

### **Required:**

From your experience in the field, are there other important components that are left out? If so what are they?

## **BENCHMARKING FOR MANAGEMENT CONSULTANTS**

**Mirror, mirror on the wall who is the prettiest of them all?**

### **What is benchmarking?**

Benchmarking is a method of improving business performance by learning from other companies how to do things better in order to be the 'best in the class'. Rank Xerox defines benchmarking as:

A continuous systematic process of evaluating companies recognized as industry leaders, to determine business and work processes that represent 'best practice' and establish rational performance goals.

Other organizations define the practice as:

The ongoing and objective measurement...of relative performance ... against relevant organizations...in key process areas.

A change programme, which enables the achievement of the 'best practice'.

### **What are the advantages of benchmarking?**

First of all, benchmarking can only happen in a culture in which people are prepared to have their thinking challenged and are prepared to learn from one another.

The practice offers the following advantages:

- Provides direction and impetus for improvement. Indicates early warning of competitive disadvantage
- Promotes competitive awareness
- Becomes the stepping stone to 'breakthrough' thinking. Identifies the 'best practice'
- Provides an objective attainment standard for key areas of business operations
- Links operational tactics to corporate vision and strategy. Exposes performance gaps
- Triggers major step changes in business performance. Helps companies redefine their objectives.

- Challenges the 'status quo'.
- Allows realistic stretch goals

## **How to Benchmark (Step-by-Step)**

### **Planning**

- Step 1: Identify subject to Benchmark
- Step 2: Identify “Best Practice”
- Step 3: Collect Data

### **Analysis**

- Step 4: Carry out analysis to determine competitive gaps.
- Step 5: Project future performance

### **Integration**

- Step 6: Communicate results of the analysis
- Step 7: Establish goals
- Step 8: Develop action plans
- Step 9: Implement plans and monitor
- Step 10: Benchmark

**Source:** The Economist Conferences. “Benchmarking Conference”. See Sultan Kermally, *Total Management Thinking*, Butterworth-Heinemann, Oxford, 1996.

### **Types of Benchmarking**

1. Competitive Benchmarking
2. Strategic Benchmarking (SWOT Analysis aimed at strategic changes and prioritized resource allocation)
3. Process Benchmarking
4. Product Benchmarking
5. Customer Service Benchmarking
6. Internal Benchmarking

# Leadership Mistakes

★ The Top Ten ★



Daniel Rossall Valentine  
[daniel@doctordaniel.co.uk](mailto:daniel@doctordaniel.co.uk)

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## MISTAKES

IT COULD BE THAT THE PURPOSE OF YOUR LIFE IS  
ONLY TO SERVE AS A WARNING TO OTHERS.

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What do you think?



- Write a list of the 5 most common mistakes managers make that undermine their work performance. (5 min) <
- Now make a list of the 5 mistakes you make most often that undermine your work performance. (5 min) <<

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## Contents

1. The Ten Mistakes
2. Categorising the Ten Mistakes
3. The Five Myths underneath the Ten Mistakes
4. Q & A



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## 10 Top Mistakes Leaders Make

1. Being too "hands-off"
  2. Putting paperwork before people
  3. Failing to give clear feedback
  4. Resistance to new ideas
  5. Dictatorship in decision-making
  6. Hurrying recruitment
  7. Not treating all employees equally
  8. Fail to provide clear direction
  9. Fail to react quickly to problems
  10. Trying to be friends with direct reports
- Which mistakes can you identify in your department?
  - What excuses do you make to yourself to justify the mistakes?



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I never make  
the same mistake  
twice. I strive  
for five or  
six times.



© GABRIEL URTAS  
04-07-07

- **Why do we repeat our mistakes?**

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## 10 Top Mistakes Leaders Make

### 1. Being Too "Hands-Off" (Laissez Faire)

- One of your team has just completed an important project. The problem is that he misunderstood the project's specification, and you didn't stay in touch with him as he was working on it. Now, he's completed the project in the wrong way, and you're faced with explaining this to an angry client.
- Many leaders want to avoid **micromanagement**. But going to the opposite extreme (with a hand-offs management style) isn't a good idea either – you need to get the balance right.

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### 2. Putting Paperwork before People

#### *Confessions of an Obsessive-compulsive*

- The greater the leadership role, the less time there seems to be for people.
- The greater the leadership role, the more important peoplework is.
- People are opportunities, not interruptions.
- Only through association is there transformation.

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### Signs of a Paper-pusher

- "People bother me-they are interruptions."
- "I prefer to be alone-to get my work done."
- "Work would be great-except for the people!"
- Out of touch with the networks and currents in the workplace.

- - - More

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- Tends to run over people-insensitive
- Listens poorly-if at all
- Impatient-tend to say, "out with it!"
- Alone, aloof, and lonely
- Self-worth based on accomplishment.

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### Why do we put paperwork before peoplework?

- Seen results take priority over the unseen relationship.
- Taskwork pushes aside "idle" talk.
- The material word predominates over the immaterial world.
- We feel we are judged by what we do, not who we are.
- Obsessive-compulsive behavior.
- Relationships don't fit our "deadlines" mentally.

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### How to Push aside the Paper

- Delegate more
- Learn to "ransack" instead of reading everything.
- See people as priority one
- MBWA, Manage by wondering around.

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### 3. Lack of Feedback

- Everyone needs to know how they are doing
- Leadership has as much to do with the “soft sciences” as with getting things done.
- We wildly underestimate the power of the tiniest personal touch of kindness.
- Learn to read the varying levels of affirmation your people need.
- According to 1,400 executives polled by The Ken Blanchard Companies, failing to provide feedback is the most common mistake that leaders make. When you don't provide prompt feedback to your people, you're depriving them of the opportunity to improve their performance.

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### 4. Resistance to new ideas from below

- Mavericks can save us from the slide toward institutionalism
- Large organizations usually kill off mavericks before they can take root
- Learn to recognize truly useful mavericks.

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### How to recognize legitimate mavericks who can bring you into the future:

- They care, not just for their own ideas but also for the goals of the organization.
- They are making a difference in their present position.
- They are willing to earn the right to be heard.
- Others are following their leadership – influence is taking place and it is producing good results.

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### How to encourage true mavericks who can help you:

- Give them a long tether – they need space to soar.
- Put them in charge of something they can really own.
- Listen to their ideas and give them time to grow.
- Let them work on their own if they wish.
- Let them alone and give them time to blossom.

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### How to stifle the mavericks in your midst:

- Have as many layers of management as possible for decisions to have to travel through.
- Keep looking over their shoulders.
- Make your policy manual as thick as possible.
- Control all important decisions at the top.
- Send everything possible to committees for deliberation.
- Always make them wait months for decisions that affect them. Put them on a team full of small-thinking bureaucrats.

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### 5. Dictatorship in Decision-making *Getting beyond, "I know all the Answers"*

- Dictators deny the value of individuals.
- The major players in an organization are like its stockholders. They should have a say in its direction.
- The one who does the job should decide how it is done.
- "Flat" organizations are the models of the future.

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### How dictators like to operate:

1. Hoard decisions.
2. Make decisions alone, in a vacuum.
3. View truth and wisdom as primarily their domain as the leader.
4. Restrict decisions to all elite people.
5. Surprise their workers with edicts from above.

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### HOW FACILITATORS LEAD

1. Push decisions down-line.
2. Involve others as much as possible in key decisions.
3. View truth and wisdom as being distributed throughout the organization.
4. Be a developer.

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5. See their people as their greatest resource for ideas that will make them and the people successful.
6. Give their people space to make decisions.
7. Let those who are responsible decide how the job will be done.

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## 6. Hurrying Recruitment

- When your team has a large workload, it's important to have a full team. But filling a vacant role too quickly can be a disastrous mistake.
- Hurrying recruitment can lead to recruiting the wrong people for your team: people who are uncooperative, ineffective or unproductive. They might also require additional training, and slow down others on your team. With the wrong person, you'll have wasted valuable time and resources if things don't work out and they leave. What's worse, other team members will be stressed and frustrated by having to "carry" the under-performer.
- You can avoid this mistake by learning how to recruit effectively, and by being particularly picky about the people you bring into your team.



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## 7. Not treating all employees equally.

- You don't necessarily have to treat every employee the same, but they must feel as if they receive equal treatment. The perception that you have pet employees or that you play favourites will undermine your efforts to manage people. This goes hand-in-hand with why befriending reporting employees is a bad idea.
- Employees who are not in your inner circle will always believe that you favour the employees who are - whether you do or not. This perception destroys teamwork and undermines productivity and success.

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## 8. Fail to provide clear direction

- Managers fail to create standards and give people clear expectations so they know what they are supposed to do, and wonder why they fail. If you make every task a priority, people will soon believe that there are no priorities. More importantly, they will never feel as if they have accomplished a complete task or goal.
- Within your clear expectations, if you are either too rigid or too flexible, your reporting employees will feel rudderless. You need to achieve an appropriate balance that allows you to lead employees and provide direction without dictating and destroying employee empowerment and employee engagement.
- When your people don't have clear goals, they muddle through their day. They can't be productive if they have no idea what they're working for, or what their work means. They also can't prioritize their workload effectively, meaning that projects and tasks get completed in the wrong order.

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## 9. Fail to react quickly to problems

- **Fail to react to problems and issues that will soon fester if ignored.**
- Managers have a habit of hoping that an uncomfortable issue, employee conflict or disagreement will just go away on its own if they don't provoke it or try to resolve it. Trust me. It won't. Issues, especially among people, just get worse unless something in the mix changes.
- Proactive intervention from the manager to coach and mentor, or to make sure employees have the skills necessary to resolve the issue, is imperative. Drama and hysteria do interrupt productivity, motivation, and employee engagement.

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## Staff Problems

### Mistake 1

- Ignoring unacceptable behavior in hopes that:
  - a) no one else will notice,
  - b) it will correct itself, and/or
  - c) the employee will eventually just go away

### Mistake 2

- Saving up a laundry list of occurrences in hope that, when added together, they will justify a bigger penalty

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## Examples of staff problems

- Arguments
- Malicious gossip
- Bad language
- Excessive tardiness or absenteeism
- Gross misconduct
- Incompetence
- Inefficiency
- Insubordination
- High error rate

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#### 10 Trying to be friends with direct reports.

- **Trying to be friends with people who report to you.**  
You can develop warm and supportive relationships with employees who report to you. But, you will have difficulty separating the reporting relationship in a friendship. Friends gossip, go out together, and complain about work and the boss. There is no room for their manager in these kinds of relationships.
- Most of us want to be seen as friendly and approachable to people in our team. After all, people are happier working for a manager that they get on with. However, you'll sometimes have to make tough decisions regarding people in your team, and some people will be tempted to take advantage of your relationship if you're too friendly with them.
- This doesn't mean that you can't socialize with your people. But, you do need to get the balance right between being a friend and being the boss.

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#### Recap - 10 Top Mistakes Leaders Make

1. Being Too "Hands-Off"
2. Putting Paperwork before people
3. Lack of Feedback
4. Resistance to new ideas
5. Dictatorship in Decision-making
6. Hurrying Recruitment
7. Not treating all employees equally
8. Fail to provide clear direction
9. Fail to react
10. Trying to be friends with direct reports.

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#### Categories of mistakes

The four stages of management activity (Fayol, 1916)

- Planning-related
  - Resourcing-related
  - Execution-related
  - Control-related
- 
- Place each of the ten mistakes in the stage that fits best.

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## Why do managers make mistakes? The Five Myths \*

- **Myth 1:** Managers wield significant authority.
- **Myth 2:** Authority flows from the manager's position.
- **Myth 3:** Managers must control their direct reports.
- **Myth 4:** Managers must focus on forging good individual relationships.
- **Myth 5:** The manager's job is to ensure things run smoothly.

\* Based on: **Linda A. Hill, Becoming the Boss, January 2007, Harvard Business Review**

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## Replace the 5 myths with the 5 realities

	MYTH	REALITY
Defining characteristic of the new role:	<b>Authority</b> "Now I will have the freedom to implement my ideas."	<b>Interdependency</b> "It's humbling that someone who works for me could get me fired."
Source of power:	<b>Formal authority</b> "I will finally be on top of the ladder."	<b>"Everything but"</b> "Bolks were wary, and you really had to earn it."
Desired outcome:	<b>Control</b> "I must get compliance from my subordinates."	<b>Commitment</b> "Compliance does not equal commitment."
Managerial focus:	<b>Managing one-on-one</b> "My role is to build relationships with individual subordinates."	<b>Leading the team</b> "I need to create a culture that will allow the group to fulfill its potential."
Key challenge:	<b>Keeping the operation in working order</b> "My job is to make sure the operation runs smoothly."	<b>Making changes that will make the team perform better</b> "I am responsible for initiating changes to enhance the group's performance."

- Email [daniel@doctordaniel.co.uk](mailto:daniel@doctordaniel.co.uk) if you would like the full article on the five myths

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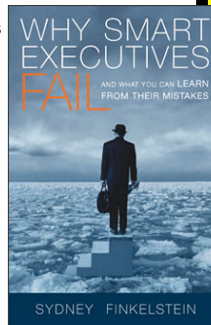
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## Further Reading Why Smart Executives Fail

- Sydney Finkelstein, the Steven Roth Professor of Management at the Tuck School of Business at Dartmouth College, published "Why Smart Executives Fail" in 2003
- In it, he shared some of his research on what over 50 former high-flying companies – like Enron, Tyco, WorldCom, Rubbermaid, and Schwinn – did to become complete failures.
- It turns out that the senior executives at the companies all had 7 Habits in common. Finkelstein calls them **the Seven Habits of Spectacularly Unsuccessful Executives**.
- Article: **The seven habits of spectacularly unsuccessful executives**, Sydney Finkelstein. 2004, Richard Ivey School of Business




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## Questions?

### Acknowledgements

Thanks to Professor David Iornem  
for contributing research to this presentation

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# Group Decision Making

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## Contents



1. Video case study
2. Pros and cons of group decision-making
3. Group-think
4. Brainstorming
5. Methods of improving group decision-making
6. Case study – extreme decision-making
7. References

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## Video Case



- What aspects of decision making are illustrated by the following clip?
  - Video: Frasier "Enemy at the gate"



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## Pros & Cons



- What is the ideal size of a group for making business decisions?
- What is the ideal composition of a group for making business decisions?
- Now form these groups.
- Your first task in your new group:
  - What are the principles of good group work?
  - What are the pros and cons of group decision making?

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## Argument for Group Decision Making



- Diversity of experience, expertise and perspectives
- Production of more alternatives
- Faulty assumptions and data can be identified
- Participants are more committed to carrying out
- Coordination and communication are simpler and better because everyone understands
- It may be politically necessary to involve certain people.

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## Criticisms of group decision making



- Group decision making is slow
- Groups are often dominated by one individual or a small clique, thereby negating many of the virtues of group processes.
- Groups can "play games" - Group participants get involved in winning arguments and showing off
- If consensus is required people may conform to get the meeting over. Consensus often produces mediocre decisions.
- Over reliance on group decision making can inhibit management's ability to act quickly and decisively when necessary.
- Group can be indecisive
- Victim to **Groupthink**
- The expert may not be recognised / utilised
- Group interaction and the need for agreement usually result in the acceptance of more risk than would be accepted by an individual decision maker.
- Implementing a decision, whether or not it was made by a group, is usually accomplished by individual managers.

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## Group Decision Making



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### Group Decision Making Works Best When:

- Members are accustomed to working together as a team
- Members have a common goal
- Members respect the leader
- Decision requires multiple specialist inputs
- The leader is skillful at keeping the meeting on target
- The group is rewarded for making good decisions <<

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## Group Problems – Groupthink (Janis, 1982)



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### What is it?

Groupthink refers to the deterioration of group decision making quality under certain circumstances.

Contributory factors include:

- Ideologically homogenous group
- Lack of process
- Directive style of leadership
- Threat or crisis
- A desire to maintain group cohesiveness
- Isolation from independent expertise
- Member insecurity (low self esteem) <<



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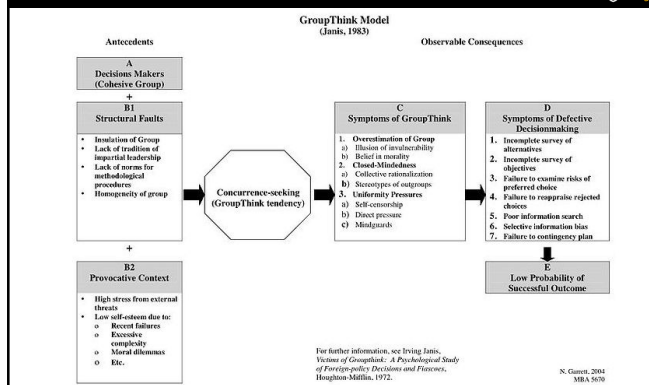
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## The Groupthink Model



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# Groupthink



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Under these circumstances, the group may indulge in the following actions:

- Failing to question underlying assumptions.
- Coalescing around a single person or policy.
- Use of stereotyping
- Sense of invulnerability
- Failure to criticise the developing consensus (self-censorship)
- Excluding people who disagree with the developing consensus.
- Little attempt to consult experts.
- Little discussion of implementation.
- Filtering out conflicting information.
- Consideration of only a few alternatives. <<

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## Divergence & Convergence

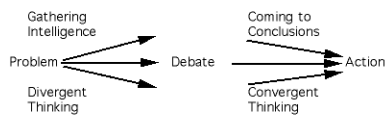


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### GROUPTHINK

Problem < > Too Rapid Convergence → Action

### IDEAL GROUP PROCESS



### DEBATING SOCIETY

Problem (No Closure) No Action

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## Examples of "Groupthink"



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Groupthink is prevalent at senior levels in politics, corporations and the military where pressure to conform to peers and obey leaders is high. Examples include:

- German invasion of Russia (1941-1945)
- US invasion of Vietnam (1955-75)
- US invasion of Cuba (1961)
- British underestimation of Argentina (1982)
- US underestimation of Al Qaeda (2001) <<

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## How to avoid groupthink



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1. Leaders should allow each member to challenge ideas and present objections.
2. Members should talk about and solicit ideas with people outside the group.
3. Outside Experts should be invite to attend meetings.
4. So that divergent viewpoints can be presented, the leader should not make his or her own position known too early.
5. Assign **Devil's Advocate** at all meetings to challenge any and all ideas. <<

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## Methods of Generating Alternatives



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- Brainstorming
  - The process of suggesting many possible alternatives without evaluation.
- Synectics
  - The process of generating novel alternatives through role playing and fantasizing.
- Nominal Grouping
  - The process of generating and evaluating alternatives using a structured voting method that includes listing, recording, clarification, ranking, discussion, and voting to select an alternative.
- Delphi Technique
  - The process of using a series of confidential questionnaires to refine a solution.

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## Improved Group Decision Making



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- Devil's Advocacy
  - A person is assigned to identify all the weaknesses and possible objections to the proposal.
- Dialectical Inquiry
  - Two different groups are assigned to the problem and each group is responsible for evaluating alternatives and selecting one of them
  - Top managers then hear each group present their alternatives and each group can critique the other.
- Diversity
  - Increasing the diversity in a group may result in consideration of a wider set of alternatives. <<

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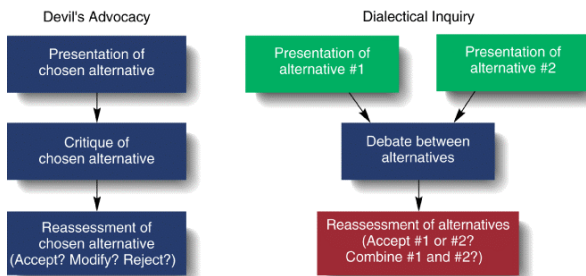
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## Devil's Advocacy and Dialectical Inquiry



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## Brainstorming Guidelines



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- One major reason why brainstorming is useful is that it helps to free us from 'functional fixedness'. We have a fixed idea, for example, that a thing has only one function and that is what it is there for.
- Ideas rarely arrive in this world fully-formed and giftwrapped. With a little practice you can learn to build on ideas, to take the germs of success in someone else's half-baked idea and to develop it towards fruition
- Guidelines**
  - Don't criticise contributions.
  - The more unusual the idea, the better
  - Strive for quantity
  - Listen to the ideas of others and see if you can build on them
  - Allow others to build on your ideas for the common good.
  - Ideas should not be elaborated or defended, just quickly stated and recorded.

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## Responses That Kill Creativity



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- "It can't be done."
- "We've never done it."
- "Has anyone else tried it?"
- "It won't work in our department (company/industry)."
- "It costs too much."
- "It isn't in the budget."
- "Let's form a committee."



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## EXERCISE

## Brainstorming

This image shows a single sheet of white paper with horizontal blue ruling lines. A vertical red line runs down the left side, creating a margin. The paper is otherwise blank, with no handwriting or other markings.[illegible]

## EXERCISE

## Now apply what you have learnt..

This is a blank sheet of white paper with horizontal blue ruling lines. A single vertical red line runs down the left side, creating a margin. The paper is otherwise empty of any text or markings.

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## Conclusion

## Guidelines for Building Decision Making Skills



- Be sure of your authority for making decisions
- Accept responsibility fully
- Distinguish what's important
- Make the decision at the time it is needed
- Be alert to signs of problems needing solutions
- Keep an open mind
- Consult your supervisor when a problem is beyond your ability to solve
- Make sure that you are not part of the problem
- Learn from your mistakes
- Evaluate your decisions when carried out

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## **The Institute of Management Consultants**

8<sup>th</sup> Floor, NNDC Building, 18/19 Ahmadu Bello Way, P.O Box 9194, Kaduna – Nigeria

Website: [www.imcnig.org](http://www.imcnig.org), Tel No. 08022887111, Email: [info@imcnig.com](mailto:info@imcnig.com)

# **CONTINUING PROFESSIONAL DEVELOPMENT PROGRAMME (C.P.D.P)**

## **APPLICATION FOR CMC CERTIFICATION (BASED ON THE ICMCI INTERNATIONAL STANDARDS)**

### **Instructions**

Applicants are required to provide evidence of active engagement as management consultants. You are to provide at least two referees and names and addresses of two organizations for whom you have worked as a consultant. Please provide as many documentary evidence as you can to support your applications.

1. Name: \_\_\_\_\_

2. Membership Grade: \_\_\_\_\_ Date of Admission into IMC: \_\_\_\_\_

3. Present Contact Address: \_\_\_\_\_

Tel: \_\_\_\_\_

E-Mail: \_\_\_\_\_ Website \_\_\_\_\_

4. Your Consulting Firm: \_\_\_\_\_

(If not a Consulting Firm then state name of organization): \_\_\_\_\_

What consulting functions do you perform in this non-consulting organization? \_\_\_\_\_

\_\_\_\_\_

5. Your position in the organization i.e. Job Title: \_\_\_\_\_

**CREDIT HOURS ACHIEVED OVER THE PAST TWELVE MONTHS**

S/N	Activities	Credit hours Achievable	Credit Hours Claimed
1. a). b). c). d). e).	Project in which you have been involved during the last 12 months	10	
2.	Submission of a Research paper	10	
3.	Lecturing or Seminar Presentations (Give details)	10 for non-lecturers 5 for lecturers	
4.	Attendance of Seminars (Give details)	10	
5.	Authorship of a published paper (Give details )	5	
6	Authorship of a published books (Give details)	10	
6.	Participation in Board Meetings as non Executive Director	5	
7.	Participation on a Committee or a Commission of investigation	5	
8.	Postgraduate Studies (Diploma, Masters, Doctorate)	10	

6. State the names, telephone numbers, e-mails and location addresses of two referees

- a. ....
- .....
- .....
- b. ....
- .....
- .....

**7. Details of organizations for which you have provided consultancy services within the last (12) Twelve Months**

**(A)**

- a. Name of Organization.....
- b. Address of the Organization.....
- c. The Client Contact Person .....
- d. Telephone Number of the Client Contact Person.....

**(B)**

- a. Name of Organization.....
- b. Address of the Organization.....
- c. The Client Contact Person .....
- d. Telephone Number of the Client Contact Person.....

**8. Particulars of Sponsor (1)**

- a. Name .....
- b. Contact Address .....
- c. Phone Number (s).....
- d. Email. ....
- e. Signature..... Date .....

**9. Particulars of Sponsor (2)**

- a. Name .....
- b. Contact Address .....
- c. Phone Number (s).....
- d. Email. ....

e. Signature..... Date .....

**Undertaking by the CMC Applicant**

I promise to abide by the regulations guiding CMC Standards Registration. I shall at all times abide by the Code of Professional Conduct of the IMC and ICMCI Rules

I certify that the statements and claims made by me in this submission are correct.

Signature of Applicant: \_\_\_\_\_ Date: \_\_\_\_\_

Witnessed by: \_\_\_\_\_ Date: \_\_\_\_\_

(Only Members of the IMC can witness)

**FOR OFFICE USE ONLY**

**References/Assessment**

- ☐ Professional References
- ☐ Confirmation of consulting engagements
- ☐ Face-to-face interview/examination by the CMC Assessment Committee
- ☐ Result communicated
- ☐ Other comments: Details

## ANNEX 1:

### JUSTIFICATION OF CREDIT HOURS ACHIEVED OVER THE PAST 12 MONTHS

S/N	Activities	Credit Hours Achievable	Credit Hours Claimed
1.	Project in which you have been involved within the last 12 months	10	
2.	Submission of a Research Paper	10	

3.	Lecturing or Seminar Presentations (Give Details)	10 for non- lecturers, 5 for lecturers	
4.	Attendance of Seminars (Give Details)	10	



5.	Authorship of Published Paper(s) (Give Details)	5	
6.	Authorship of Published Book(s) (Give Details)	10	

7.	Participation in Board Meetings as Non-Executive Director	5	
8.	Participation on a Committee or a Commission of Investigation	5	

9.	Postgraduate Studies (Diploma, Masters, Doctorate)	10	
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### CMC Reference

#### Introduction

To be a Certified Management Consultants (CMC), all applicants need to provide references. This Form is to be completed by a client for whom the CMC Applicant has worked. Comments made on the applicants have no legal binding on any referee or on his client organization.

1. **Name of CMC Applicant** \_\_\_\_\_
2. **Summary of CMC Applicant's Qualifications** (To be provided by the Applicant himself)

#### 3. FEEDBACK AND COMMENTS OF THE REFEREE

- a) Referee's Name \_\_\_\_\_
- b) Referee's Organization \_\_\_\_\_
- c) Referee's Position in the Organization \_\_\_\_\_
- d) For how long have you known the Applicant? \_\_\_\_\_
- e) Please comment on the Applicant's professional competence and character  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- f) What consultancy assignment(s) has this person done for you/your organization? \_\_\_\_\_  
\_\_\_\_\_
- g) How do you rate the quality of job done for you/your organization? \_\_\_\_\_  
\_\_\_\_\_

Referee's Signature \_\_\_\_\_

Date \_\_\_\_\_

# THE INSTITUTE OF MANAGEMENT CONSULTANTS

## WHAT CLIENTS EXPECT FROM MANAGEMENT CONSULTANTS

Management consultants abound in several different fields and sectors of the economy including accounting, education, advertising, career counseling, computer consulting, human resources, insurance, business management, public relations, interior decoration, and so on. The importance and need for consultancy services cannot be overemphasized. However, it is important to note that organisations and individuals who buy and engage the services of management consultants do so for various reasons.

When management consulting services are bought, the clients have certain expectations in mind; perhaps, chief amongst these expectations is that the client wants the consultant to solve his/her problems. Nevertheless, it can be dangerous to assume that all clients are looking for or want the same thing(s) when they hire consultants.

According to Sandlin (2014), some of the expectations of clients that engage the services of management consultants include the following:

1. To obtain specific expertise
2. To identify problems
3. To supplement a company's internal staff
4. To act as a catalyst for change
5. To be an objective onlooker
6. To teach
7. To do a company's dirty work
8. To bring new life to an organisation
9. To assist with a business launch
10. To share contacts

According to Iornem, clients want engage consultants because they want the consultants to:

**TO OBTAIN SPECIFIC EXPERTTISE:** Clients sometimes have no better choice than to hire consultants especially when the internal staff do not possess the kind of experience (track record) and expertise in a particular field or area.

**TO IDENTIFY PROBLEMS:** According to Sandlin, "Sometimes employees are too close to a problem inside an organization to recognize it." Another reason why inside staff may find it difficult to identify problems is the issue of objectivity. Due to the fact that they are directly involved, they may not want to admit that there is a problem even when it is glaring.

**TO SUPPLEMENT A COMPANY'S INTERNAL STAFF:** Rather than hire full-time employees, some clients prefer to employ consultants, especially as this can help to save a lot of money for the company. According to Iornem (1996), staff augmentation is meaningful when such tasks that need to be performed are occasional. He also explains further that "in some cases, especially in creative fields, hiring outside consultants is a way to acquire new talent on a regular basis"

**TO ACT AS A CATALYST FOR CHANGE:** Human beings are generally negative to change. After becoming comfortable with our present conditions, we do not want anything that will disrupt or alter the status-quo. A consultant, who is coming from outside the organisation, will find it easier to stimulate a change in the policy or processes being observed in a company especially because he is impartial and can do so without worrying about corporate culture or employee morale.

**TO BE AN OBJECTIVE ONLOOKER:** The objectivity with which a consultant will provide suggestions and solutions to problems and issues within an organisation that he is rendering consulting services to is higher and commendable than that of internal staff because he (the consultant) "does not have a vested interest in any one plan" (Iornem, 1996). A good consultant, besides being impartial, can give a fresh and objective viewpoint on issues.

**TO TEACH:** Consultants teach employees and their clients new skills. This may be in the handling of troubling issues or how to use new technology, e.g., computer software applications.

**TO DO A COMPANY'S DIRTY WORK:** Some tasks are unpleasant. A typical example is sacking/firing staff or making staff cuts. Many clients find it easier to hire consultants to do such tasks. Iornem (1996) explains that a consultant can implement such tasks that no one would want to do in a company and thereafter disappear (having completed his job) leaving nobody around to shoulder the blame.

**TO BRING NEW LIFE TO AN ORGANISATION:** When an organisation is dying or crumbling, sometimes, it takes the services of an expert (consultant) to retool and reinvent the entire company so as to get it back on its feet.

**TO ASSIST WITH A BUSINESS LAUNCH:** Clients want consultants to assist with new business development and the monitoring of the daily operations of the same business. Hiring consultants to oversee operations on a daily basis is more likely when a high financial risk is involved in the business according to Iornem (1996). A typical example is when a bank is providing warehousing credit may hire a consultant to supervise the warehousing and issuance of stocks.

TO SHARE CONTACTS: One why clients engage consultants is as a result of the network of highly influential people that such clients have worked for/with in the past. In the course of engaging such a well-connected consultant, the client may get referrals for new business from the consultant (and vice versa too.)

## CONCLUSION

The clients who hire consultants are looking for solutions. Irrespective of their individual needs/desires, it can be broadly said that clients must have identified a problem and are seeking for reasonable solutions to those problems when they seek to engage consultants on the job.

The extent to which a consultant is able to deliver solution and give apt recommendations where necessary can be directly proportional to the continuity of his business relationship with clients.

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## The Institute of Management Consultants

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### *Code of Ethical Professional Conduct for IMC Members and CMCS*

#### **Minimum Guidelines Approved by the International Council of Management Consulting Institutes (ICMCI)**

##### **Confidentiality**

A member will treat client information as confidential and will not take personal advantage of privileged information gathered during an assignment, or enable others to do so.

##### **Unrealistic Expectations**

A member will refrain from encouraging unrealistic expectations or promising clients that benefits are certain from specific consulting services.

##### **Commissions / Financial Interest**

A member will neither accept commissions, remuneration or other benefits from a third party in connection with recommendations to a client without the client's knowledge and consent, nor fail to disclose any financial interest in goods or services which form part of such recommendations.

##### **Assignments**

A member will accept only assignments for which the member has the skills and knowledge to perform.

##### **Conflicting Assignments**

A member will avoid acting simultaneously (in potentially conflicting situations) without informing all parties in advance that this is intended.

##### **Conferring with Clients**

A member will ensure that before accepting any engagement, a mutual understanding of the objectives, scope, workplan and fee arrangements is established and any personal, financial or other interests which might influence the conduct of the work are disclosed.

##### **Recruiting**

A member will refrain from inviting an employee of a client to consider alternative employment without prior discussion with the client.

##### **Approach**

A member will maintain a fully professional approach in all dealings with clients, the general public and fellow members.

##### **Code of Professional Conduct**

A member will ensure that other management consultants carrying out work on the member's behalf, are conversant with and abide by the Code of Professional Conduct.



*Certified Management Consultant*

ICMCI Trustee

National President

Member



# THE INSTITUTE OF MANAGEMENT CONSULTANTS

## THE INSTITUTE OF MANAGEMENT CONSULTANTS & CERTIFIED MANAGEMENT CONSULTANT CERTIFICATION (CMC)

### What is the IMC?

The IMC is the Institute of Management Consultants. It is a body of professional management consultants approved and registered by the Federal Government of Nigeria.

The Constitution and by-laws establishing the IMC empower it to promote and regulate the standards and practice of management consulting among its members throughout Nigeria. The Institute of Management Consultants is the body of professional management consultants approved and registered by the Federal Government of Nigeria. Its membership is made up of individuals, consulting firms and organisations that share responsibility or are potential beneficiaries of improved standards in consulting practice.

The Institute of Management Consultants was incorporated in 1983.

The Institute serves as a spokesperson for the consulting industry in Nigeria. At global fora the Institute plays a major role for the advancement of management consulting. At the World Conference of Consultants held in Yokohama, Japan, the Institute presented a key paper on Consulting Strategies for the 21st Century. The IMC – Nigeria and the IMC – South Africa are the only two professional bodies in Africa admitted into the **International Council of Management Consulting Institutes (ICMCI)**.

### Objectives of the IMC

1. To bring together those professionals who offer consultancy services in the field of management sciences and related disciplines
2. To improve standards of professional performance
3. To encourage the training and development of Nigerian Consultants
4. To provide opportunities for dialogue among practicing consultants
5. To increase the understanding of consultancy's true role in both business and government.
6. To provide opportunities for consultants to improve their technical and consulting skills through specialized training and career development programmes
7. To gain public recognition for the Institute's certification and to enhance the reputation of management consulting as a profession

8. To assure the public that members possess the ethical standards and the professional competence and independence required for membership and are, therefore, qualified to practice
9. To help ensure standards, which will engender public confidence in the management consulting profession.

### **Benefits of IMC**

1. A direct Involvement with a growing body of senior professionals exchanging ideas and setting new standards.
2. A unique opportunity for self-development. IMC have frequent opportunities to exchange ideas with experienced consultants and update and expand their consulting skills. Self-development in IMC is an on-going programme encapsulating new ideas and procedures in all phases of management consulting.
3. Access to information and services. IMC headquarters office and full-time staff serve as a clearing house of information on consulting strategies and techniques. A journal, newsletter and special research reports keep members informed about emerging issues in the profession, locally and internationally.
4. Client information. As a service to clients, IMC maintains extensive files on management consultants and provides information regarding consultants with particular skills. MIMCs are usually cited for client selection because their credentials are known

Membership of the IMC affords you a unique opportunity of direct involvement with a growing body of senior professionals, exchanging ideas through seminars, roundtable discussions, and setting new standards. Membership consists of professional persons with shared values, standards and objectives. As such, it is a consortium of professional and experienced experts, many of whom are internationally respected management experts, consultants, researchers and educators.

### **What is CMC?**

CMC (Certified Management Consultant) is the new qualification designed by the International Council of Management Consulting Institutes (ICMCI). It is a response to the growing demand and necessity for an international standard qualification in management consulting. It is the outcome of efforts initiated in 1986 at the Paris Congress to harmonize qualifications for management consultants. Holders of CMC qualification are instantly recognised as having met strict standards of quality set by ICMCI.

### **Who Can Authorize Use of CMC Qualification?**

CMC is an international registered trade mark. No one can use it unless he is authorized by ICMCI. The ICM is one of two national institutes allowed to administer the CMC qualification in Africa. The IMC of South Africa is the other institute. The role of the IMC is to carry out an audit of all applicants to ensure that the standards of quality set by ICMCI have been complied with. After that, a CMC certificate is issued. Management Consultants in Nigeria and other parts of Africa who meet the standards set by the ICMCI are issued a certificate of CMC registration by the IMC. This certificate is tenable for only 12 months. To qualify to use CMC, members have to reapply and demonstrate that the standards which were audited and ascertained as having met ICMCI requirements are still in place.

### **Who Can Use the CMC Qualification?**

Only members of the management consulting profession who meet the standards set by ICMCI and who are issued a CMC certificate can use the CMC qualification after their name. They can also use the following CMC logo on their business or call cards:



### **CMC**

The CMC logo can also be used on their letter headings and other stationery.

### **How the ICMC Standards are Implemented by the IMC.**

Before the introduction of the CMC, the IMC had a Continuing Professional Development Programme (CPDP) in line with developments internationally. As a member of the ICMCI, we have integrated this programme with the ICMCI standards. We meet our own national standards and those of the ICMCI through strict implementation of the CPDP and adherence to a Code of Ethical Professional Conduct which comprises all elements of the ICMCI Code of Conduct.

### **Examination**

Applicants for the CMC are examined to ensure that they meet the requirements specified by the ICMCI. The examination may take the form of scrutinizing and cross-checking the evidence provided and / or oral interview.

### **Achieving CMC through the CPDP**

In brief, CMC (Certified Management Consultant) qualifications distinguishes those who have taken practical steps to keep up-to-date with major developments and issues in their chosen profession as practical independent professional practitioners. (CMC and FCMC) or of internals (CPC and FCPC). Achievement of verifiable 35 credit hours selected from a range of practice development activities will qualify a member for this distinctive identification which is bound to be a comforting assurance to clients who deal with a consultant they know is ascertained by peers and the Institute as being up-to-date and current.

The IMC-CPDP is a unique programme designed to encourage life-long learning by consultants and thus guaranteeing clients consistent and up-to-date professional resources. CMC, FCMC, CPC, FCPC will be maintained as appropriate for differentiation, indicating an individual consultant's commitment to updating his knowledge and skills on a continuing basis. You lose the appellation once you stop learning.

The conditions and requirements for the CMC qualification have been designed to meet standards set by the International Council of Management Consulting Institutes (ICMCI) of which the IMC is a full member.

CPDP: Distinguish the First Among Equals.  
Total Credit Hours Required: 35 Hours

### **How to Achieve the Credit Hours**

1. Submission of a Research Paper to the Institute in line with IMC Guideline (Compulsory)-15 Hrs.
2. Involvement in at least five projects/programmes (Pro-rata Hours for less number) - 10 Hrs.
3. Lecturing/Seminar presentation.-10Hrs for non-lectures – 5Hrs for lecturers.
4. Attendance of Seminars (Two days Minimum) -10Hrs.
5. Authorship of a published paper - 5Hrs
6. Authorship of a published book – 10Hrs
7. Participation in Board meetings as a non-Executive Director – 5Hrs.
8. Participation on a committee or commission of investigation – 5Hrs.
9. Studies for Postgraduate Diplomas, Masters/Ph.D. - 15Hrs.

Points must come from No.1 and from at least any three other areas from 2-9. The credit hours can be achieved only by involvement in at least four of the identified areas of continuing education/professional development programme.

### **Providing Evidence**

When you have completed a minimum of 35 Hours of CPDP activities, write to the Director General of programmes enclosing all attestations and copies of supporting evidence for examination and verification. A flat fee of N2500 payable in bank draft is charged to defray administrative / postal charges, the accreditation procedure and ICMCI affiliation expenses. Upon receipt of your submission, a standard application form shall be forwarded to you for completion. No further payment is required.

### **CMC Quality Certification**

The Institute of Management Consultants (IMC) is the authorized administrator and certification agency for the ICMCI Quality standards in Nigeria.

The CMC quality standards qualification is a Registered Trade Mark. It cannot be used by anyone unless by authority of ICMCI. Authorized members shall be issued a certificate. Certified Management Consultants can use the CMC logo shown on the front of this brochure on their company stationery and complimentary cards.



The International Council of Management Consulting Institutes  
ICMCI (CMC-Global) Secretariat Physical Address (**effective January 1, 2017**):  
C/O Maurer & Stager AG  
Fraumunsterstrasse 17/Postfach 318  
CH – 8024 Zurich

Email: [cmc-global@cmc-global.org](mailto:cmc-global@cmc-global.org)  
Website: [www.cmc-global.org](http://www.cmc-global.org)

# IMC-Nigeria: CMC Certification Standard & Requirements



CMC Certification Workshop &  
Membership/Fellowship Induction

# IMC-Nigeria: Certification of *“CMC Practicing Licence”*

- **IMC-Nigeria:** One of the 2 accredited national CMC certifying institutes in Africa, the other being IMC-South Africa;
- **Compliance with the CMC Certification Standard:**
  - ✓ *CMC Equivalence Principle, & Reciprocity Principle;*
  - ✓ CMC Certification Tools: CF, CBK, Code of Professional Conduct, & Additional Pre-requisites;
  - ✓ CMC Certification Requirements;
  - ✓ CMC Certification Process;

# ... “CMC Practicing Licence” (cont’d)

- **Initial Certification Process:**

- Candidate submits duly completed CMC Application Form to IMC-Nigeria;
- Designated CMC Certification Panel conducts assessment, guided by the prescribed certification requirements, using the certification tools, & following the certification process;
- Panel submits recommendations for CMC Certification Committee’s consideration;



# ... “CMC Practicing Licence” (cont’d)

- CMC Certification Committee awards CMC designation on behalf of IMC-Nigeria;
- Candidate appeals to the Chair, CMC Certification Committee, in case of dissatisfaction with the process or its outcome
- **Re-Certification :**
  - **Purpose:** Maintain CMC accreditation towards ensuring that CMC holders are current with their competencies, continuing to keep up their skills, contributing to the profession of management consulting;

# ... “CMC Practicing Licence” (cont’d)

- **Periodicity:** Annually;
- **Confirmation:** All the undertakings in the initial CMC certification;
- **Continuing Practice:** Evidence as a practicing Management Consultant in the past one year;
- **Code of Professional Ethics:** Continued compliance with the IMC-Nigeria’s *“Code of Ethical Professional Conduct for IMC Members and CMCs”*

# Next Steps

Aspirants for CMC certification are required to:

- Obtain & submit duly completed CMC Application Form to IMC-Nigeria ;
- Undertake rehearsal self-assessment against the CMC Certification Assessment Tools:
  - ✓ Competence Framework;
  - ✓ Summary Common Body of Knowledge;
  - ✓ “Code of *Ethical Professional Conduct for IMC Members and CMCs*”;
  - ✓ *Additional Pre-requisites*;
- E-mail any enquiries to: [info@imcnig.com](mailto:info@imcnig.com)

# Next Steps (Cont'd)

Visit:

- [www.imcnig.com](http://www.imcnig.com);
- [www.imcnig.org](http://www.imcnig.org);
- [www.cmc-global.org](http://www.cmc-global.org);

# THE ICMCI



CMC - GLOBAL

CMC Certification Workshop &  
Membership/Fellowship Induction

# WHY ICMCI WAS SET UP

1. To form a worldwide organization for national certifying bodies of management consultants to work together to achieve common objectives to improve the profession.
2. To enhance the flow of information among the existing national certifying bodies of management consultants in order to increase the knowledge of the process, encourage assistance between institutes and improve the process of certification throughout the world.

*...More*

# WHY ICMCI WAS SET UP

3. To elevate the standard of management consultants worldwide while increasing the acceptance of management consulting as a respected profession.
4. To encourage the networking of management consultants across national boundaries, improving the free flow of information and developing a greater cooperative spirit between countries.

***...More***

# WHY ICMCI WAS SET UP

5. To encourage reciprocity among national institutes with recognized universal standards and adherence to an international Code of Professional Conduct.



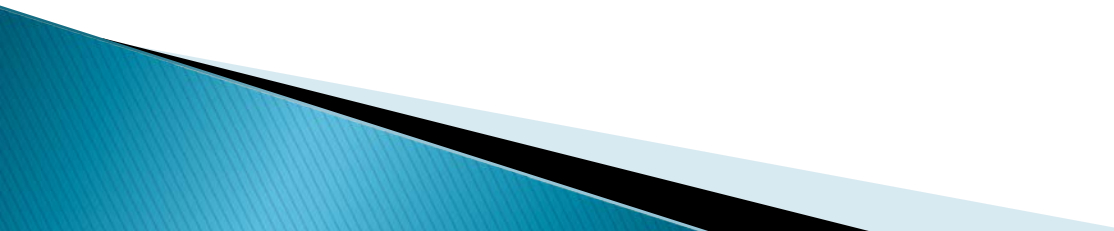
**The vigorous pursuit of these objectives led to:**

Creation of a Uniform Body of Knowledge on which basis uniform certification standards have been set up.

CMC (Certified Management Consultant) qualification by enhancing quality assurance among member institutes.



# **ACHIEVEMENTS**

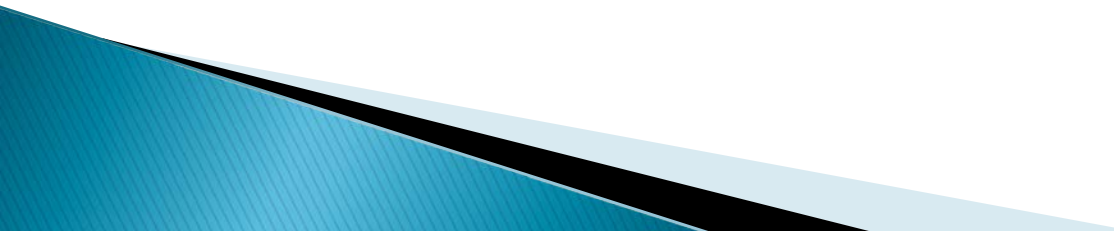
- 1. CMC Competency Model and Standards**
  - 2. Knowledge Transfer**
  - 3. Marketing of the CMC/increasing CMC Visibility**
  - 4. Membership Growth**
  - 5. Linkages with Big Practices**
  - 6. Communication**
  - 7. Linkages with International Bodies**
  - 8. Resourcing**
- 

# KEY BENEFITS OF ICMCI MEMBERSHIP

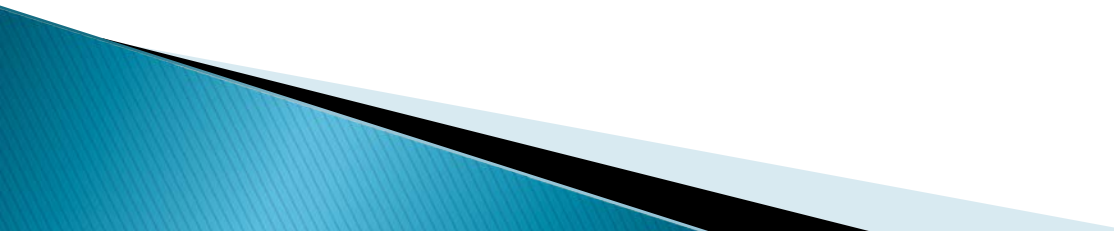
1. ICMCI makes interaction of professional colleagues possible.
2. ICMCI is a learning community.
3. ICMCI programmes promote recycling of ideas.
4. ICMCI is a platform that stimulates personal development of individual consultants.

*...More*


# KEY BENEFITS OF ICMCI MEMBERSHIP

5. ICMCI endorsement through the CMC Competency standard is a useful marketing quality for individual consultants.
  6. ICMCI creates networking opportunities.
  7. ICMCI is a major source of information on consulting skills.
- 

# CMC COMPETENCY MODEL BENEFITS

- ★ The Client Community
  - ★ The Government
  - ★ The Consulting Firms
  - ★ Individual Consultants
- 


# **Benefits to the Individual Consultant**

- ★ Compels him or her to engage in continuing professional development since this is a requirement for recertification.
  - ★ CMC is a brand that can be marketed.
  - ★ CMC is a professional endorsement accepted in over 40 countries including all G8 countries .
- 

# Benefits to the Consulting Firms


- ★ CMC is a basis for improved quality
- ★ CMC is a brand franchise
- ★ CMC Competency model is a basis for training.

# **Benefits to the Client Community**

- ★ CMC is assurance of quality.
  - ★ CMC is an easier way to know who is a qualified consultant since it is based on a Uniform Body of Knowledge and common standards.
  - ★ CMC is a safety valve for risk prevention.
  - ★ Compliance to Code of Ethics by CMC has an inbuilt dispute resolution system.
- 

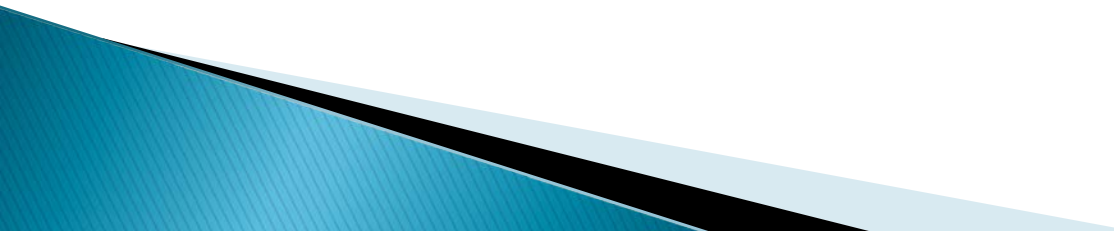


# Benefits to Governments

- ★ CMC Competency standard supports governments in creating order in merit.
  - ★ CMC can be a reliable Tender Criterion.
  - ★ The CMC is linked to an ethical code, making it possible for mediation in times of dispute.
  - ★ CMC promotes skill development on a continuing basis.
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# ICMCI AND THE UNITED NATIONS

An important achievement of the ICMCI is its attainment of the status; of an NGO within the United Nations. The ICMCI is now recognized as an NGO of the United Nations with consultative status.



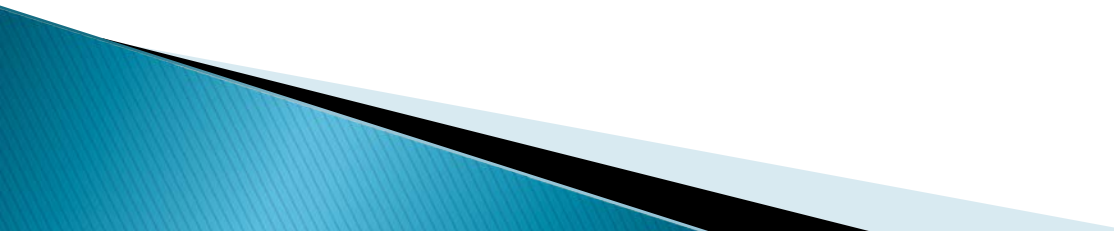
In this status, the ICMCI can participate in consulting assignments with the United Nations and its agencies.

The ICMCI can send delegates to relevant meetings of UN agencies.

The ICMCI can make submissions of not more than 500 words to debates of the United Nations (and these submissions shall be published in UN proceedings)

Other privileges accorded to similar organizations.

**The benefits of the ICMCI status with the United Nations by extension accrue to members, i.e. the Institutes of Management Consultants (IMCs). The IMCs can approach Un agencies in their respective countries for assignments and quote the ICMCI status with the United Nations. The IMCs can also nominate delegates to United Nations agencies and special bodies through the ICMCI.**



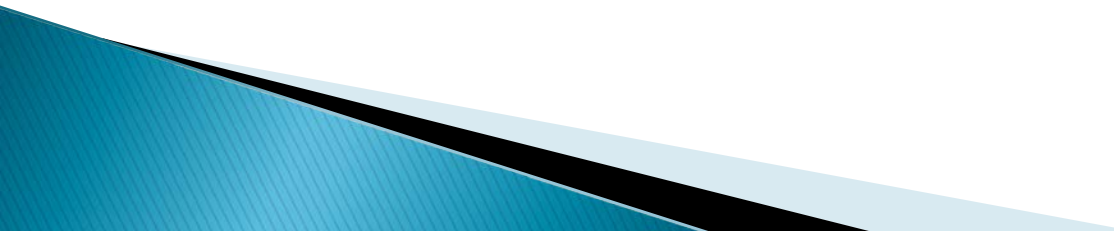
# MILESTONES OF THE ICMCI

For the ICMCI, the journey so far can be regarded as very successful. Definite milestones can be counted via:

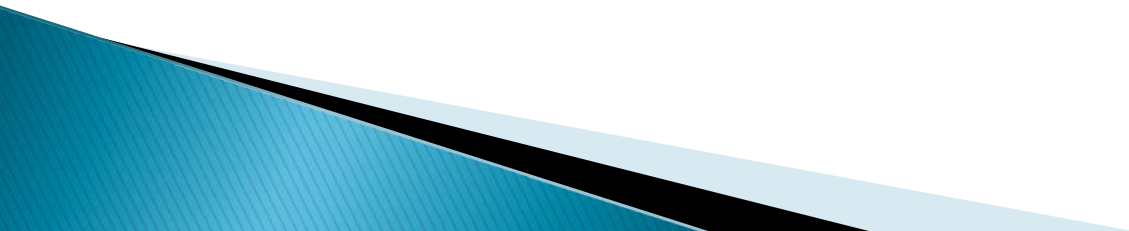
- ★ Membership Development; there are now over 50 member institutes.
- ★ Certification standards i.e. the CMC Competency Model.
- ★ Code of Professional Conduct.
- ★ Uniform Body of Knowledge (UBK).
- ★ Flow of information among members.

*...More*

# MILESTONES OF THE ICMCI

- ★ Reciprocity in the recognition of member institutes' educational processes and certification procedures.
  - ★ Congress effectiveness as a meaningful forum for member institutes.
  - ★ Knowledge transfer.
  - ★ Communication.
  - ★ Attainment of NGO status with the United Nations.
- 

**THANK YOU**



# A GUIDE TO EFFECTIVE DELEGATION

## Meaning of delegation

- Delegation is the assignment of any responsibility or authority to another person (normally from a manager to a subordinate) to carry out specific activities.
- It is an act of empowering another person to perform an activity

Very often it amounts to giving control, authority, a job, or a duty to another person. However, the person who delegated the work remains accountable for the outcome of the delegated work.

## The process of delegation

1. Assess and define the task to be delegated.
2. Select the delegatee: This has to do with the person who is to be given the task.
3. Explain the task to the delegatee. If necessary, train the person.
4. Provide necessary resources and other forms of empowerment.

## Benefits Of Delegation:

1. Delegation gives your employees opportunities to learn and grow dramatically and can alter both productivity and workplace wellbeing.
2. **Increases your earnings: This is because, by assigning duties to several people you can attend to more clients.**
3. **Delegation encourages creative problem-solving.**
4. **Delegation is one of the methods of managing time.**
5. **Delegation encourages communication between levels of management.**



6. **Delegation is a form of involvement and participation in the work process. People who are involve in decision making and in carrying out the assignment feel good about their work. This leads to commitment, high moral and motivation.**

**Reasons why Some managers do not delegate:**

1. They are afraid that someone else might do the task more effectively. They are afraid that somebody else may over shadow them.
2. They may truly believe that they are the only ones who really know how to do the task well.
3. Some managers do not delegate because they see the task as a key part of their authority or status.
4. Some managers may not realize that delegation contributes to employees development.
5. They may be afraid that their boss, customers or client will blame them if the task is not performed well.
6. They may simply enjoy doing the task that is to be delegated.
7. Some managers do not delegate because they are involved in corrupt practices in the course of their work, and so they are afraid that delegating task may expose them.
8. They are afraid that the subordinates may outshine them.

***You can see clearly that fear lies behind most reasons why some managers may not want to delegate. This is a psychological factor that can be eliminated by training and coaching of those concerned.***

## **Why Some Subordinates are Reluctant to Accept Delegation.**

1. **Lack of Trust in Themselves:** They have no confidence in themselves. They think they will bungle the job.
2. **Difficulty in Decision-Making:** Carrying out delegated task involves a series of decision making. Some subordinates lack the courage to decide. Such subordinates tend to run back to their boss for any kind of decision making. In a way, they are practicing reverse delegation which should not be encouraged.
3. **Poor rapport between superior and subordinate:** This can lead to resistance to accepting delegation

**Fear of criticism:** They are afraid that they may make a mistake and become open to criticism.

## **Is there anything that may not be delegated?**

**YES:** you may delegate any task and authority to your subordinates but in the final analysis, you cannot delegate responsibility.

You cannot say: Oh, it was Mr. ABC that did this or that. No.....you are accountable, responsible for whatever is the outcome of the delegation. You cannot pass the buck.

## **LEVELS OF DELEGATION.**

When delegating a task to someone, it is helpful to let the person know the level of authority you are allowing him or her to exercise. The levels of delegation may be viewed as boundaries of authority set out for the person.

There are FIVE possible levels of authority in delegation,

Level 1: Do exactly what I tell you. Do not deviate.

Level 2: Go and research this task. Come back to me for a decision, then I will tell you what to do.

Level 3: Go and research the task. Outline possible options and make recommendations. I will decide and tell you to move forward.

Level 4: Go and carry out the task. Make all decisions and tell me what you have done.

Level 5: Go and carry out the task. Make all the decisions as you think best. I have the trust and full confidence in you.

As leaders and managers, we have to delegate at the various levels. Selecting the level depends on the situation and on training and experience of the individual that is being delegated to.

# **ISO 20700 Guidelines for Management Consultancy Services**

## **IMC-Nigeria: CMC Certification Workshop & Membership/Fellowship Induction**

### **Syndicate Discussion Questions**

1. What is ISO Quality Management System (QMS) all about?
2. What is ISO 20700?
3. What is the main purpose of the ISO 20700?
4. What are the benefits of the ISO 20700 to the Management Consultant Service Providers (MCSP)?
5. What are the benefits of the ISO 20700 to the Client Community?
6. How can MCSP or Management Consulting Firms use ISO 20700?

# Digest of ISO 20700:

## Guidelines for Management Consultancy Services

By

*Gabriel A Gundu, PhD, FIMC, CMC*  
*IMC-Nigeria's Delegate to ICMCI/CMC-Global*

### 1.0. Context: ISO Quality Management System (QMS)

#### 1.1 ISO Foundation and Purpose

Founded in London, United Kingdom, on 23 February 1947, **ISO** (*International Organization for Standardization*) is an independent, non-governmental, international standards-setting body. ISO has a membership of 162 national standards bodies. It was one of the first organisations granted General Consultative Status with the UN Economic and Social Council (ECOSOC).

ISO is an abbreviated name which the organization adopted, with reference to the Greek word *isos* (ἴσος, meaning "equal"), for use in its three official languages: English, French, and Russian.

ISO has set over twenty thousand proprietary, industrial and commercial standards, covering everything from manufactured products and technology to food safety, agriculture and healthcare etc. These standards constitute a Quality Management System (QMS).

#### 1.2 ISO QMS

##### 1.2.1 QMS Defined

##### 1.2.1.1 Varied definitions of QMS exist, notably:

- **UK Department of Trade:** *"a set of co-ordinated activities to direct and control an organization in order to continually improve the effectiveness and efficiency of its performance"*(Dti.gov.uk, n.d.).
- **(Wikipedia.org):** *"a collection of business processes focused on achieving quality policy and quality objectives to meet customer requirements"*

- **Hawks (n.d.):** *“the totality of organizational processes, people, internal controls, resources, and goals focused on producing a given output that meets defined specifications”.*
- **Master Control Inc:** *“a structure or framework for the implementation of quality management processes*
- **NAPBS (2009):** *a formalized system that documents the structure, responsibilities, and procedures required to achieve effective results, in the area of quality”*
- **Pillay (2006):** *“All the coordinated activities of the overall management function of an organization that determine its quality policy, objectives, and responsibilities and its implementation by means of a quality management system” etc.*

#### **1.2.1.2 Observations:**

- I. The afore-cited definitions have emphasized organization-wide activities, implying that quality is everybody’s business unit in the organization;
- II. One cannot fail to notice in every discussion of QMS is that, keywords such as ‘continually improve’, ‘meet customer requirements’, ‘meet defined specifications’, ‘implementation of quality’ and ‘achieve effective results’ have created a convergence which can better be described as a concern by all members of the organization for continuous improvement. Hence it can be said that a QMS is a system that ensures continuous improvement in processes and outputs of an organization. In some cases an organization’s output are vulnerable to outside forces.

### **1.2.2 Perspectives on Core Elements of a QMS**

#### ➤ **INGAA Foundation Inc. (2014)Perspective:**

- I. Management Commitment
- II. Resource Management – machines, people, time
- III. Planning and development of processes – efficient, effective.
- IV. Measurement, Analysis and Improvement – inspection, audit.
- V. Documentation and Records.

#### ➤ **Wikipedia.org Perspective:**

- I. Quality policy
- II. Quality objectives
- III. Quality manual
- IV. Organizational structure and responsibilities
- V. Data Management
- VI. Processes - including purchasing
- VII. Product quality leading to Customer satisfaction
- VIII. Continuous improvement including corrective and preventive actions
- IX. Quality instruments

### **1.2.3 QMS Benefits:**

As outlined by FQM Limited (n.d.) and NAPBM (2009), these include:

- I. Increased Efficiency
- II. Increased Revenue
- III. Improved Employee Morale
- IV. Enhanced National/International Recognition
- V. Improved Factual Approach to Decision Making
- VI. Improved Supplier Relationships
- VII. Sound Documentation:
- VIII. Sustained Consistency
- IX. Enhanced Customer Satisfaction
- X. Process Improvement:
- XI. Improved Marketing
- XII. Enhanced Growth and Learning

It needs to be added that the documents of ISO standards are developed by technical committees and are normally not available for purchase

## **2.0 Digest of ISO 20700: Guidelines for Management Consultancy Services**

The document of this Standard was prepared by Project Committee ISO/PC-280: Management Consultancy. It provides formal guidelines of good practice in management consultancy service provision.

**2.1 Document Trajectory:** Document development started in Milano, February 2014, and finished in Beijing, January 2016, with publication in June 2017

**2.2 Proprietor:** ICMCI/CMC-Global

**2.3 Base:** Premised on research, experience and good practice of a wide range of Management Consultancy Service Providers (MCSPs), the document includes recommendations to improve the specification, execution, acceptance of the outcome and closure of management consultancy services.

**2.4 Core Purpose:** Though not intended for certification purpose, the document seeks to improve transparency and understanding between Clients and MCSPs, in order to achieve better results from consultancy projects. Appropriate application of this document enables MCSPs to provide better value for clients and reduce risk in management consultancy assignments. By improving quality, professionalism, ethical behavior and interoperability of management consultancy, this document is intended to enhance the effectiveness of the management consultancy industry and accelerate the development of the profession.

**2.5 Main Focus:** Deliverables and outcomes of management consulting, though innovation, differentiation and ethical behavior are important parts of MCSP's value proposition.

**2.6 Form:** This document takes the form of an *easy-to-understand* guidance document, written from the perspective of management consultancy.

**2.7 Applicability Scope:** All MCSPs regardless of size or operation field, including sole proprietors, partnerships, associations, governmental and non-governmental organizations, internal departments of corporations etc.

**2.8 Guiding Principles:**

- I. Written as guidance;
- II. Applicable to all MCSPs, organizations and not their internal resources;
- III. Based on outcomes;
- IV. Protects innovation and differentiation;
- V. Emphasizes importance of understanding client's needs;
- VI. Easy-to-understand

**2.9 Standard Consulting Process:**

- i. **Contracting:** (3.7 Contracting set of activities aimed at reaching an *agreement* (3.1) to provide *MCS*)
- ii. **Execution:** (3.9 execution: performance of the management consultancy services)



- iii. **Closure:** (3.5 closure: set of activities aimed at ending the assignment(3.2) between the MCSP, the client (3.4) and the recipient (3.21)

## **2.10 Policies in the Standard Consulting Process:**

- i. Awareness of the regulatory framework;
- ii. Stakeholder engagement and commitment;
- iii. Code of ethical and professional conduct
- iv. Project governance
- v. Capability
- vi. Communication
- vii. Data protection and confidentiality
- viii. Protection of intellectual property
- ix. Social responsibility
- x. Health and safety
- xi. Risk and quality management

## **2.11 Benefits of the ISO 20700**

### **2.11.1 Client Perspective**

- I. Improved client understanding and visibility of the benefits they can experience through the consultancy services
- II. Enhanced Customer Satisfaction;
- III. Assurance of quality;
- IV. Easier way to know who is *consulting according to the ISO 20700 QMS*;
- V. Safety valve for risk prevention;

### **2.11.2 Perspective of the Individual Management Consultancy Service Provider (IMCSP)**

- i. Enhanced Credibility with Clients:
- ii. Increased Efficiency
- iii. Increased Revenue
- iv. Enhanced National/International Recognition
- v. Improved Factual Approach to Decision Making
- vi. Improved Supplier Relationships

- vii. Sound Documentation:
- viii. Sustained Consistency
- ix. Enhanced Customer Satisfaction
- x. Improved Process Management:
- xi. Improved Marketing Visibility
- xii. Improved Growth and Learning
- xiii. Improved visibility of the use and benefits of management consultancy ethical values transparency, quality, innovation and trust
- xiv. Learned techniques and good practices used for the effective delivery of management consulting services
- xv. Developed ability to better understand the client's needs and provide better value for them
- xvi. Reduced risks in providing management consulting services
- xvii. Ensured more predictable outcomes
- xviii. Improved quality, professionalism, and ethical behaviour during consulting assignments

## **2.12 How MCSP or Management Consulting Firms can use ISO 20700**

### **2.12.1 Rebranding of Management Consultancy Services Provision:**

- I. **MCSPs' Slogan:** *"Consulting according to ISO 20700"*.
- II. **Self-Assessment Checklist:** *Organize Hands-on-Training Workshops;*
- III. **On Website:** *"As MCSPs we deliver our services according to ISO 20700";*
- IV. **On Business Card:** *"MCSP who delivers services according to ISO 20700"*

### **2.12.2 Actual Practice:**

- I. Upholding the guiding principles of ISO 20700;
- II. Complying with the Standard Consulting Process
- III. Policies in the Standard Consulting Process

## **2.14 Towards Effective Implementation:**

- I. **CMC-Global: Developed ISO 20700: Toolbox**
- II. **ISO 20700:** Train-the-Trainer Course on the Self-Assessment Checklist (vide copy of the Self-Assessment Checklist annexed to this document):

- ✓ **Date:** 02/06/2018
- ✓ **Venue:** Kiev, Ukraine
- ✓ **Purpose:** Accredite the IMCs to conduct practical and hands-on training of MCSPs in delivering services according to ISO 20700;
- ✓ **Participation:** Open to IMC's Certification Committee Members; CMC Trainers willing to provide the training on behalf of the IMC; CMCs willing to provide the training on behalf of the IMC; CMC Assessors etc.

### III. **ISO 20700- One Year Anniversary:**

- ✓ **Date:** 06/06/2018
- ✓ **Venue:** Vienna, Austria
- ✓ **Specific Thematic Focus:**
  - **ISO Service Standards:** The Strategy of ISO 20700 and Opportunities for MCS;
  - **ISO 20700 – Contribution to Success** (Panel Discussion);
  - **ISO 20700 Future Context:** Possible Routes for the Consulting Industry to Strive for Success
- ✓ **Participation:** Stakeholders from 20 countries with representatives from six international organisations attended the event. Whilst demonstrating their support for ISO 20700, they discussed how the Standard will evolve and be implemented in the future.  
The ICMCI board members present at the event also acknowledged the value of the standard. Sorin Caian, Chair of ICMCI, stated that "Management consulting is all about adding value. There are two components that help assure this: professionalism and ethics and both are apparent and instilled in the standard." Robert Bodenstein, PC 280 Chair commented that "Management consulting is a young profession, in most countries it is not regulated in any way. ISO 20700 helps to achieve common goals that can be agreed between consultants and clients". This was followed by Ilse Ennsfellner, Chair CEN TC 381 saying "Together, management consultants and clients can shape our future; The ISO 20700 standard will be a best seller as it clarifies the rights and responsibilities of both the provider and the user of the service."

As part of increasing awareness of the standard, CMC-Global launched a number of tools and actions including the self-declaration list, the tailored training programme targeting consultants and clients, and the [www.iso20700.org](http://www.iso20700.org) website.

- iv. **IMC-Nigeria:** Incorporating ISO 20700 in the curriculum of the CMC Certification Workshop and Membership/Fellowship Induction Programme with effect from June 2018.

## ISO 20700: Self-Assessment Checklist

- 1) We understand the relevant terms the same way  
☐ Yes      ☐ No      ☐ Other
- 2) Appropriate resources from MCs provenance and clients responsibility identified and available  
☐ Yes      ☐ No      ☐ Other
- 2) All relevant national and international norms and standards considered  
☐ Yes      ☐ No      ☐ Other
- 3) Ongoing evaluation and improvement process is installed  
☐ Yes      ☐ No      ☐ Other
- 4) Significant laws and norms are specified and agreed on  
☐ Yes      ☐ No      ☐ Other
- 6) Suitable dialog with the client's set up  
☐ Yes      ☐ No      ☐ Other
- 7) Relevant stakeholders are identified and engaged  
☐ Yes      ☐ No      ☐ other
- 8) Our ethical and professional conduct is aligned with the clients  
☐ Yes      ☐ No      ☐ Not necessary      ☐ Other
- 9) We have a code of conduct  
☐ Yes      ☐ No      ☐ Other
- 10) We decided on how to confront identified differences between ours and the clients code of conduct  
☐ Yes      ☐ No      ☐ Not necessary      ☐ Other

11) We govern our projects

☐ Yes      ☐ No      ☐ Other

12) We made sure that we have the appropriate capabilities throughout the assignment

☐ Yes      ☐ No      ☐ Other

13) We protect our confidential data and information and safeguard the rights of privacy of stakeholders

☐ Yes      ☐ No      ☐ Not applicable      ☐ Other

14) We protect our intellectual property and the rights of the client's intellectual property

☐ Yes      ☐ No      ☐ Not applicable      ☐ Other

15) We consider social responsible, health and safety issues in doing our business

☐ Yes      ☐ No      ☐ Other

16) We manage risks and quality issues continually

☐ Yes      ☐ No      ☐ Other

17) We have an identifiable process from contracting to closure the assignment

**Contracting Execution Closure**

☐ Yes      ☐ No      ☐ Other

18) We gather feedback to learn from our projects

☐ Yes      ☐ No      ☐ Other