

IMC USA's Competency Framework and Certification Scheme for Certified Management Consultants™ (CMC®)

*IMC USA's mission: promote excellence and ethics
in management consulting through certification,
education and professional resources.*

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Introduction

The Management Consulting Competency Framework defines the competences and standards for management consultants, and forms the basis of the IMC USA's Certified Management Consultant™ qualification (CMC®). The competences presented herein set forth the knowledge, skills and behaviors required of successful management consultants. There are three levels of progression covered in the framework— Early, Advanced, and Professional Leader, all underpinned by professional behaviors and ethics.

In 2015, the IMCUSA Board of Directors agreed to adopt the ICMCI 2014 Competency Framework as the IMC USA Framework rather than maintain a separate IMC USA Framework. The ICMCI Competency Framework represents the work of ICMCI Professional Standards and Quality Assurance committees with members from all over the world begun in the late 1990s and carried forward to today. This action will allow IMC USA to focus on moving the global standard forward and meeting that standard.

The CMC® qualification is relevant for all practicing consultants to management, including those in large and medium-sized firms, niche firms, specialty consultants, internal consultants, networked groups, and independent consultants, and will continue to remain a core offering of the Institute of Management Consultants USA. It defines the standards to be met by “fully competent consultants” and broadly speaking, is targeted at those consultants who:

- Are currently active in consulting: able to demonstrate that in three of the last five years management consulting has been a significant part of his or her activity. This can include consulting with clients; selling, managing and / or supporting consulting activity; preparing for and teaching consultancy; publishing and writing on consulting, technical specialties, client business segments, and related topics
- Have at least a Bachelor's Degree or two additional years consulting experience with documented professional development
- Are experienced in all elements of the consulting life cycle;
- Can take full ownership for delivery of a project or a major work stream;
- Have experience in managing others; and
- Have demonstrated their contribution is highly valued by clients.

IMC USA wishes to acknowledge all of the previous original and derivative work by ICMCI members and IMC USA members which has resulted in this document.

A Higher Standard of Competence and Performance

Developmental Stage	Early	Advanced	Profession Leader
Expertise	Provides technical skills/ experience to a project. Developing skills defined by Common Body of Knowledge (CBK) and Competency Framework (CF)	Secures, designs, and manages small consulting projects. Practices skills consistent with Common Body of Knowledge and Competency Framework	Can secure, design, and manage large, complex, team-based consulting projects. Meets highest international standards of competence, including IMC USA CBK and CF
Scope	Narrow specialty in a technical discipline / industry	Applies expertise across industries and disciplines	Creates new approaches to applying expertise across industries and disciplines
Organization focus	Tactical support to middle management.	General business advice to managers and executives	Broad strategic advice to senior managers and executives/Board of Directors
Value to Client	Solves technical/tactical problems	Recommends and implements solutions to client needs	Sought by and considered a partner by executives. Long term engagements and retainer relationships are the norm
Commitment to Profession	May belong to technical and/or trade associations and to IMC USA. Does not subscribe to a formal code of ethics	Member of IMC USA and bound to IMC USA Code of Ethics. Has obtained CMC® certification. Actively contributes to the profession.	Member of IMC USA and bound to IMC USA Code of Ethics. Has obtained CMC® certification. Actively contributes to professional organizations and the profession
Experience	Up to 3-5 years as an external or internal consultant	5-15 years as an external or internal consultant with experience managing increasingly large complex projects	Greater than 15 years as an internal or external consultant

A Competence Based Professional Qualification for Individual Consultants

The Institute of Management Consultants USA believes in a sector-wide definition of the term “management consulting” :

“Management consulting is the providing to management of objective advice and assistance relating to the strategy, structure, management and operations of an organization 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.”

The definition of management consulting is a key driver for the development of our competence framework.

The Competency Framework

The IMC USA Competency Framework defines those competencies required to be a successful management consultant. The competences are the behaviors, skills and knowledge that a management consultant is expected to understand, apply and demonstrate. IMC USA’s Competency Framework is built upon the Common Body of Knowledge and the core competencies described in this document, both of which are aligned with ICMCI’s requirements for reciprocity of the CMC with other affiliated IMC organizations.

An effective Management Consultant requires a balance of behaviors, skills and knowledge

- **Business and Technical Competence**

This is the application of fact-based knowledge of technical skills, business understanding, sector insight, and external awareness.

- **Consulting Competence**

These are the core consultancy skills, tools, and techniques which are essential in delivering consulting services.

- **Values and Ethical Behavior Competence**

These define the professional skills, behaviors, and attitudes which act as “enablers” in achieving market capability, knowledge and Consulting Competence. They establish the level of ethical best practices, credibility and trust between the client and the consultant.

A Successful Management Consultant Requires a Combination of Skills

“Management consultants are those organizations and/or individuals that participate in the process of management consulting within a framework of appropriate and relevant professional disciplines and ethics designed for the activity of management consulting.”

Source: Institute of Management Consultancy (UK), definition in self-regulation paper

The successful management consultant requires a combination of skills, and provides strategic and tactical solutions to a client. These include:

- Change management skills
- Technical and business knowledge
- Business acumen and understanding
- Ownership, management and delivery of solutions to clients
- Project delivery and risk management
- Interpersonal skills
- Ability to transfer skills to others
- Creative and analytical thinking
- Adherence to a code of conduct and ethical guidelines

Skill Requirements for the Next Generation of Management Consultants

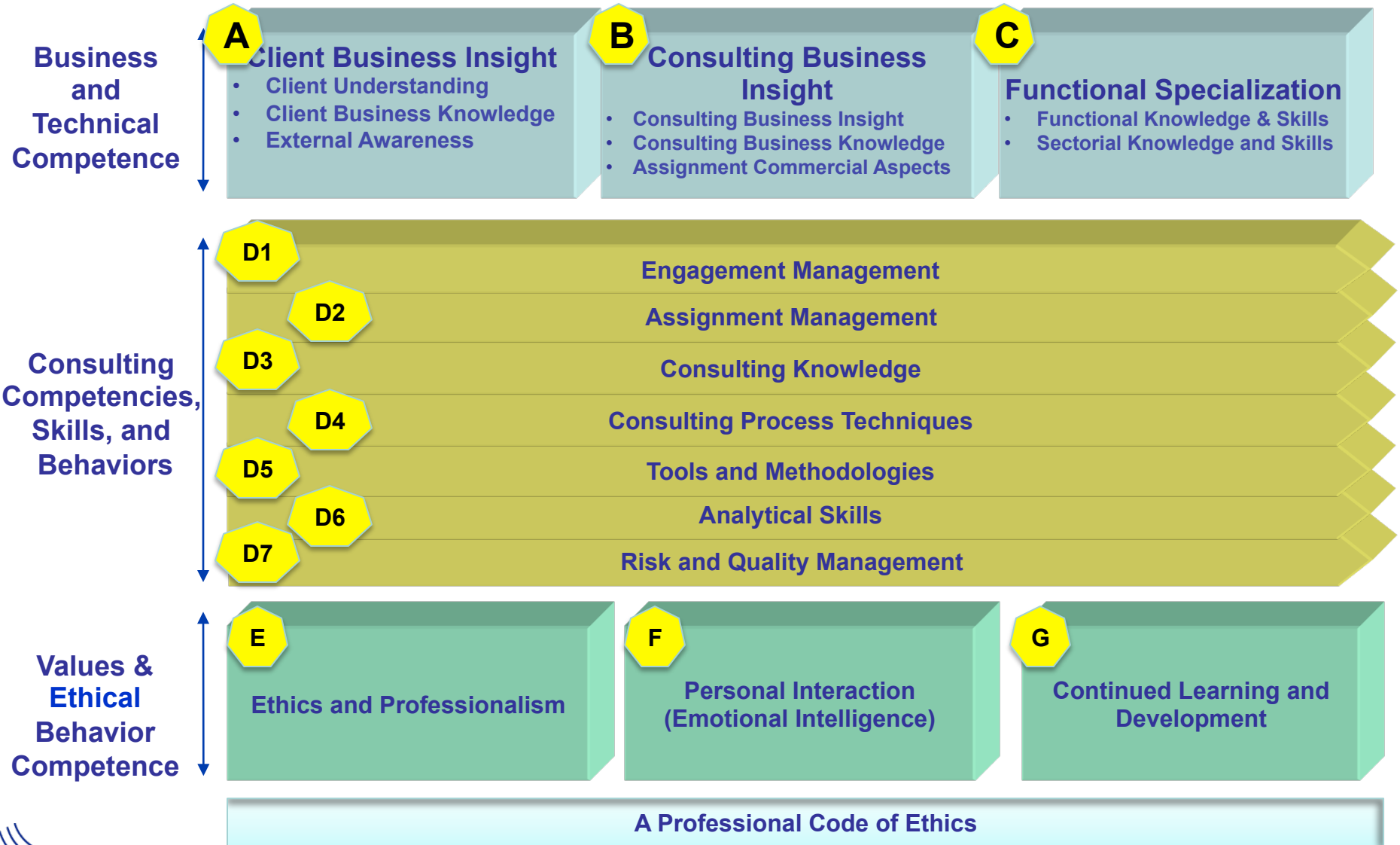
Some initial observations ...

- The boundaries of what constitutes management consulting are expanding and evolving
Larger consultancies are offering services spanning strategy to outsourcing
- There are low barriers of entry for individual practitioners, and thus clients are becoming more selective buyers
- Clients are demanding specialized technical knowledge or skills provided by the expert not the generalist
- The balance is shifting from traditional IQ based measures to emotional intelligence as predictor of excellence and success
- The future of work is changing. New organization models and growth in networked practices are impacting the future work of consultants
- The value of information is threatened as proliferation and availability increases. Effective sourcing, interpretation, and application of information is becoming a differentiator
- Independent consultants and consultancies of all sizes are seeking opportunities to collaborate with each other to add skills, resources, and market share to their businesses

This competence framework represents the current ICMCI model. It aims to give a closer definition of the baseline for all those operating in the management consulting profession as well as considering the skills required for the next generation of emerging management consultants.

ICMCI Competency Framework

CMC® has demonstrated market capability and knowledge and consulting competence supported by a balance of values and ethical behaviors.



IMC USA Core Competency Descriptions and Value to Client

Core Competence	Description	Value to Client
Client Business Insight	Understands the internal and external client business factors impacting projects	Brings an understanding of client's market, competition, industry, business models, and business processes to ensure the client that root causes, not symptoms, are addressed
Consulting Business Insight	Understands the management consulting environment and its commercial aspects	Creates a consulting relationship that that not only meets client expectations but also delivers agreed upon objectives to the client.
Functional Specialization	Recognized as an expert in own discipline	Brings an understanding of specific business functions (e.g. IT, Finance, Operations) to projects executed.
Engagement Management	Determines the scope of client assignments. Manages client and other stakeholders' expectations. Engages expertise of others where appropriate	Plans and manages consulting projects in a manner that involves and engages client personnel, stakeholders and management.
Assignment Management	Manages client assignments effectively Delivers timely solutions while balancing priorities and managing time effectively.	Effectively manages client assignments by delivering timely solutions as agreed to while balancing priorities, managing projects, and using client time effectively.
Consulting Knowledge	Captures, shares, and applies knowledge in a structured way relevant to engagement needs	Seeks, captures, and provides information, insights, and objective recommendations that are meaningful and relevant to the client.
Consulting Process Technique	Uses a range of techniques, including facilitation, coaching and mentoring to deliver solutions of mutual benefit	Recommendations and solutions are presented in a relevant and beneficial manner to the client with a range of techniques tailored to the client's internal and external environment
Tools and Methodologies	Selects and uses appropriate tools and methodologies	Seeks and deploys appropriate tools that make the engagement process effective for the client and adds value in terms of meeting client objectives.

IMC USA Core Competency Descriptions and Value to Client

Analytical Skills	Applies analytical and pro- active thinking to ensure robust and appropriate client solutions	Provides accurate, integrated information, insights, and recommendations for management to make informed decisions
Risk and Quality Management	Defines risk criteria, identifying, mitigating and managing risks and outcomes Defines quality standards, ensuring quality of delivery and client satisfaction	Helps the client organization employ financial and operational risk and quality strategies that meet compliance requirements and provide process improvement programs relevant information for decision-making.
Ethics and Professionalism	Operates with professionalism and integrity in all aspects of role including conduct, adhering to codes of practice and working in the best interests of the client	Ensures the client an objective, transparent, and ethical relationship including protecting access to confidential and sensitive client and client industry information.
Personal Interaction (Emotional Intelligence)	Takes and maintains responsibility for actions and impact of selected course of action on others. Handles complexity in the operating environment. Interacts effectively with others to achieve desired outcomes. Demonstrates influencing and communication skills.	Ensures the success of the project and professional resolution of interpersonal difficulties if they occur. This provides client peace of mind that enables client managers to continue their regular duties during the engagement.
Continued Learning and Development	Plans self-development and shows track record of personal growth	Provides clients with the benefits of knowledge in current business practices including methodologies, and processes that assure project quality and achievement of client goals and objectives.
A Professional Code of Ethics	Abides by a written set of guidelines issued by an organization to its workers or members of a profession to help them conduct their actions in accordance with its primary values and ethical standards. Consultants members of IMC USA adhere to high ethical standards in the conduct of providing services to clients and in their dealings with their colleagues and the public.	A Code builds a client's trust in a consultant by articulating consultant values. It provides the client a reference of how the consultant will balance lack of clarity and subjectivity of any ethical decision that may arise during the consulting process. It addresses the consultant's professionalism, objectivity, confidentiality, and the moral boundaries in which he or she will operate

Client Business Insight

Competence Framework Reference		Range Statements			
Business and Technical Competence		Sub-Comp			
A. Client business Insight - <i>Understands the internal and external business factors impacting projects</i>					
		Ref#	Early	Advanced	Profession Leader
A1	Client understanding	A1.1	Understands core business structures, processes, management and disciplines	Researches and understands the client business, the sector in which it operates, and its stakeholders	Has credible depth of knowledge across a range of disciplines and business environments
A2	Client business knowledge	A2.1	Researches similar businesses and best practice	Analyzes business culture, structure, processes, data, management and performance criteria based on the scope of work	Leads by example, applying management and business skills in own business
A3	External Awareness	A3.1	Uses a process to identify impact on client from political, economic, social, technological, legal and environmental factors	Formulates analysis for client including current political, economic, social, technological, legal and environmental factors	Expertise is sought by external parties to advise on issues impacting own sector

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Consulting Business Insight

Competence Framework Reference		Range Statements			
Business & Technical Competence		Sub-Comp			
B. Consulting Business Insight - <i>Understands the management consultancy environment and its commercial aspects</i>					
		Ref#	Early	Advanced	Profession Leader
B1	Management Consulting Business Knowledge	B1.1	Studies the structure of consulting including cash flow, profit and loss, intellectual property, risk management, local laws and regulations	Understands the nature of the management consulting market, competitors and capabilities	Expertise is sought by external parties to advise on the nature of the consulting market
B2	Commercial aspects of assignments	B2.1	Develops commercial awareness and participates, under supervision, in scoping, pricing, risk analysis, and setting terms and conditions	Demonstrates understanding of commercial aspects of projects including scoping, pricing, risk, and terms and conditions	Advises, coaches and mentors others in the commercial aspects of management consulting
		B2.2	Develops self-marketing capability and taking part, under supervision, in negotiation of contracts	Demonstrates understanding of, and where appropriate uses, systematic methods to promote consultancy services for external and internal clients, to maintain a pipeline of opportunities and to negotiate and win contracts	Actively promotes the consulting profession through a network of contacts

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Functional Specialization

Competence Framework Reference		Range Statements			
Business and Technical Competence		Sub-Comp			
C. Functional Specialization - <i>Recognized as an expert in own discipline</i>					
		Ref#	Early	Advanced	Profession Leader
C1	Functional knowledge and skills	C1.1	Builds sector technical expertise through education, qualifications and work experience	Shows evidence of at least one year's management consulting experience in the declared primary functional specialism PLUS: • A degree or professional qualification in the functional specialism, OR • At least four years' years specialized work experience in the functional specialty	Acts as a leader / adviser / coach to others in own area of discipline
C2	Sectorial knowledge and experience	C2.1	Demonstrates knowledge of the sector in which work is carried out	Demonstrates how functional expertise has been applied in at least one business sector	Influences business thinking and agenda in one or more sectors

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Engagement Management

Competence Framework Reference		Range Statements			
Consulting Competence		Sub-Comp			
D1. Engagement Management - <i>Determines the scope of client assignments. Manages client and other stakeholders' expectations. Engages expertise of others where appropriate</i>					
	Client Focus		Early	Advanced	Profession Leader
D.1	Scoping client requirements	D1.1.1	Researches and understands client agenda and issues	Understands and defines client requirements as evidenced by client agreement	Utilizes knowledge of external issues and depth of experience to inform, challenge and define scope of work
		D1.1.2	Understands purpose and content of client proposals, including implications of local contract law	Presents clear comprehensive written proposals – if this forms part of the normal job role	Advises, coaches and mentors others in the development and presentation of project proposals
		D1.1.3	Contributes to written proposals	Engages the client in selecting, and taking ownership of, options for the structure and execution of the assignment	Advises, coaches and mentors others in the design of projects

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Engagement Management

Competence Framework Reference		Range Statements			
Consulting Competence		Sub-Comp			
D1. Engagement Management					
		Ref#	Early	Advanced	Profession Leader
D1.2	Managing client interface	D1.2.1	Understands and operates within contractual terms of engagement	<p>Manages client, and consulting stakeholder, expectations -</p> <p>Complies with contractual terms</p> <p>Conducts regular assignment reviews with client</p> <p>Communicates the assignment process effectively to clients and makes timely reports to discuss with clients the need to change purpose, scope or progress of the assignment if evidence indicates the necessity</p>	Owns, leads and manages complex client bids and proposal with teams, demonstrating depth of experience

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Engagement Management

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Consulting Competence		Sub-Comp			
D1. Engagement Management -					
		Ref#	Early	Advanced	Profession Leader
D1.3	Partnering and networking	D1.3.1	Develops network to support and add value to client engagements, including within own company, clients and external professional networks	Understands and engages expertise of others alongside own	Leverages effective, established networks to create added value for clients
		D1.3.2		Leverages network effectively to research and define client issues, generate innovative solutions for clients and/or inform delivery solution	

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Assignment Management

Competence Framework Reference		Range Statements			
Consulting Competence		Sub-Comp			
D2. Assignment Management - Manages client assignments effectively Delivers timely solutions while balancing priorities and managing time effectively.					
		Ref#	Early	Advanced	Profession Leader
D2.1	Managing successful outcomes	D2.1.1	Manages own delivery in a consulting engagement under the guidance of more experienced colleagues	Manages client assignments successfully, ensuring that objectives, deadlines and budgets are agreed and delivered on time	Leads major projects involving consulting teams and advises others on objectives, design and implementation
D2.2	Planning	D2.2.1	Plans and manages own time ensuring own deliverables are completed to required timescales and budget	Demonstrates competent use of planning tools and techniques, and sets milestones appropriate for the size and scale of the assignment	Reviews and advises on project plans
D2.3	Managing the assignment	D2.3.1	Learns to handle changes in project scope and seeks advice from senior consultants when necessary	Shows flexibility and adaptability to changing demands and deadlines. Demonstrates ability to manage ambiguity	Takes responsibility for the people working for them in a project and provides guidance on how to react to changes in the assignment. Reviews and advises on project management to ensure flexibility

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Assignment Management

Competence Framework Reference		Range Statements			
Consulting Competence		Sub-Comp			
D2. Assignment Management					
		Ref#	Early	Advanced	Profession Leader
		D2.3.2	Persists with own tasks, seeking advice from more experienced consultants when necessary	Keeps 'big picture' in focus but addresses detail and balances priorities	Reviews and advises on project management to ensure priorities are maintained and the assignment stays 'on track'
		D2.3.3	Develops awareness of priorities and time management capability	Manages own time effectively to meet deadlines	Advises, coaches and mentors others in techniques for setting priorities and time management
		D2.3.4	Works with others to develop mutually supportive relationships. Contributes to positive team working behaviors	Where appropriate, demonstrates the ability to identify, develop, describe and allocate work streams for others to meet objectives, deadlines and budgets	Draws on a range of leadership styles to ensure effective development of others. Pro-actively coaches and develops others. Manages large complex teams operating across cross-cultural boundaries
D2.4	Working on all aspects of a project	D2.4.1	Works in one or more stages of project delivery	Operates competently in all areas of project delivery from offering through to closure	Takes responsibility for the people working for them in a project and ensures that they have the required competences

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Assignment Management

Competence Framework Reference		Range Statements			
Consulting Competence		Sub-Comp			
D2. Assignment Management					
		Ref#	Early	Advanced	Profession Leader
D2.5	Managing handover to client	D2.5.1	Completes own deliverables and engages client to take ownership. Shows the ability to draw to a close own deliverables. Understands the need for client withdrawal on the basis of the progress to date indicating that this can be necessary	Anticipates handover issues and addresses during engagement. Agrees handover process with client (skills transfer, implementation, sustainability, knowledge, documentation). If withdrawing due to inability to continue, offers client recommendations on other resources, to complete the project	Responsible and accountable that the consulting team completes all outputs and deliverables. Follows up periodically with client

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Consulting Knowledge

Competence Framework Reference		Range Statements			
Consulting Competence		Sub-Comp			
D3 Consulting Knowledge - Captures, shares, and applies knowledge in a structured way relevant to engagement needs					
		Ref#	Early	Advanced	Profession Leader
D3.1	Using a logical process approach to capturing and building knowledge	D3.1.1	Builds knowledge of logical processes for data gathering and analysis	Gathers, records and analyses data and information through ordered and logical processes and translates data into useable output	Advises, coaches and mentors others in techniques for data gathering and analysis
D3.2	Sharing knowledge and experiences with others	D3.2.1	In assignments uses own knowledge to contribute within a project team	Shares acquired knowledge and experience with others in appropriate ways in order to build value for the client	Advises, coaches and mentors others in effective communication methods
D3.3	Applying knowledge, tools and technical expertise to create value for the client	D3.3.1	Develops knowledge of appropriate tools and techniques	Demonstrates how value was created for the client through use of knowledge, tools and expertise and show how this met the client's needs	Contributes to the development of consultancy tools and techniques that add value to clients

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Consulting Process Techniques

Competence Framework Reference		Range Statements			
Consulting Competence		Sub-Comp			
D4. Consulting Process Technique - <i>Uses a range of techniques, including facilitation, coaching and mentoring to deliver solutions of mutual benefit</i>					
		Ref#	Early	Advanced	Profession Leader
D4.1	Presentation	D4.1.1	Presents ideas effectively one to one or in small groups adapting style to audience	Uses presentation tools and techniques effectively	Draws on a range of experiences and techniques to adapt communication style to challenging situations and audiences
D4.2	Written reports	D4.2.1	Displays use of appropriate business language and grammar	Produces clear client correspondence and reports selecting most appropriate style to achieve desired outcome	Writes in a style appropriate to the audience across cultures
D4.3	Facilitation	D4.3.1	Develops facilitation skills and leading group sessions under supervision	Manages group processes to achieve desired outcomes, using facilitation tools and techniques to maximize the group's decision-making potential	Advises, coaches and mentors others in facilitation techniques

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Competence Framework Reference		Range Statements			
Consulting Competence		Sub-Comp			
D4. Consulting Process Technique					
		Ref#	Early	Advanced	Profession Leader
D4.4	Coaching	D4.4.1	Develops knowledge and understanding of the variety of coaching styles, skills and techniques	Where appropriate, demonstrates use of a process to enable client learning and development to occur and performance to improve. Demonstrates knowledge and understanding of the variety of styles, skills and techniques that are appropriate to the context in which the coaching takes place	Advises, coaches and mentors others in coaching techniques and their application in differing contexts
D4.5	Mentoring	D4.5.1	Develops knowledge and understanding of the variety of mentoring styles, skills and techniques	Where appropriate, demonstrates how personal knowledge and experience has been passed on to help client personnel make significant transitions in knowledge, work or thinking in order to aid their personal development	Advises, coaches and mentors others in mentoring and its application in differing contexts
D4.6	Consensus building	D4.6.1	Develops skills in building consensus and resolving conflict	Demonstrates skills in building consensus and managing conflict	Advises, coaches and mentors others in techniques of consensus building and conflict management

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Consulting Competence		Sub-Comp			
D4. Consulting Process Technique					
		Ref#	Early	Advanced	Profession Leader
D4.7	Consensus building	D4.7.1	Develops team working skills	Works effectively in a team with others and seeks support from others where appropriate	Leads teams of people and coaches people in team-working skills
		D4.7.2	Learns management techniques	Demonstrates, if in a management role, the management, development and appraisal of others and delegation of tasks	Demonstrates the management, development and appraisal of others and delegation of tasks

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Tools and Methodologies

Competence Framework Reference		Range Statements			
Consulting Competence		Sub-Comp			
D5. Tools and Methodologies - <i>Selects and uses appropriate tools and methodologies</i>					
		Ref#	Early	Advanced	Profession Leader
D5.1	Selects and uses appropriate diagnostic tools, methods and techniques	D5.1.1	Develops knowledge of appropriate tools and techniques	Evaluates tools and techniques against validity criteria and uses them to obtain best data, information or knowledge available, within budgetary or organizational constraints	Advises on use of a range of diagnostic tools, methods and techniques. Makes a holistic assessment using information and knowledge from tools and techniques and from market experience
		D5.1.2	Tests client hypotheses and solutions with robust data	Uses a variety of data gathering, problem solving and analytical techniques that take into account client and own values and objectives and the type of recommendations to be made	Develops and selects appropriate methods in In unclear situations

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Analytical Skills

Competence Framework Reference		Range Statements			
Values and Behavior Competence		Sub-Comp			
D6. Analytical Skills - Applies analytical and pro- active thinking to ensure robust and appropriate client solutions					
		Ref#	Early	Advanced	Profession Leader
D6.1	Problem solving	D6.1.1	Understands problem-solving techniques and practices their application. Observes behavior of senior consultants in challenging assumptions and probing details	Uses a logical, coherent and consistent approach to problem-solving Challenges assumptions and probes detail	Demonstrates responsibility for their own actions, and those of others who work for them, both within and external to the immediate scope of work Is able to maintain a broad view of all issues surrounding the immediate work
D6.2	Decision making and recommendation	D6.2.1	Works under supervision in client assignments	Works effectively in complex environments containing value-conflicts and uncertainties, with at most needing only indirect supervision	Advises, coaches and mentors others in the techniques of handling complex issues and dealing with uncertainty
D6.3	Interacts effectively with others	D6.3.1	Understands methods to work with others. Assesses the effect of one's personality on working relationships. Builds a network of contacts	Shares views with others, expressing own ideas and thoughts clearly and openly while also being prepared to listen to other, differing, views before reaching conclusions. Where appropriate, uses professional network to seek contributions from others	Is regarded by members of the profession as an innovator who provides creative solutions

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Risk and Quality Management

Competence Framework Reference		Range Statements			
Consulting Competence		Sub-Comp			
D7. Risk and Quality Management - <i>Defines risk criteria, identifying, mitigating and managing risks and outcomes</i> <i>Defines quality standards, ensuring quality of delivery and client satisfaction</i>					
		Ref#	Early	Advanced	Profession Leader
D7.1	Managing risk and issues	D7.1.1	Manages 'low risk' projects (low complexity, acting as sole consultant)	Analyzes risk in an engagement including, where appropriate, risk identification and evaluation (probability and impact assessment) and identifies suitable responses to risk (prevent, reduce, transfer, accept, contingency)	Manages 'high risk' projects (major clients, multi-disciplinary teams, complex and ambiguous scope of work, significant change to cash flow, capital funding, business design, market approach and profitability, sustainability, or stakeholder approval)
		D7.1.2	Pro-actively identifies and communicates issues impacting progress of own work and that of client. Requests advice in achieving milestones	Applies risk management processes including planning and resourcing, monitoring and reporting. Uses risk and/or issue logs, reports, risk mitigation and/or recovery action and the use and control of contingencies	

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Consulting Competence		Sub-Comp			
D7. Risk and Quality Management -					
		Ref#	Early	Advanced	Profession Leader
D7.2	Managing quality	D7.2.1	Understands basic quality concepts: working to specification, cost of quality. Complies with consultant team quality management processes and standards, and agreed with the client	Identifies success criteria to ensure required quality of deliverables is achieved	Contributes to the development of quality management within the profession and takes responsibility for the quality of work done by those who work for them
		D7.2.2	Seeks feedback and acts on it	Assures quality compliance of own deliverables and those of team	Leads quality assurance reviews, including direct checks with clients.
		D7.2.3	Builds track record of successful delivery in a range of support roles in client engagements	Monitors and measures client satisfaction	Advises others on design of quality assurance process

Document Title	CMC Certification Scheme Manual Appendix 1 - CMC Competence Framework	Version #	2
Document Authority	PSC	Status	Trustee Approved
System Reference	ICMCI CMC 002	Date	24-Jan-14

Ethics and Professionalism

Competence Framework Reference		Range Statements			
Values and Ethical Behavior Competence		Sub-Comp			
Ethics and Professionalism - Operates with professionalism and integrity in all aspects of role including conduct, adhering to codes of practice and working in the best interests of the client					
		Ref#	Early	Advanced	Profession Leader
E1	Demonstrating ethical behavior	E1.1	Demonstrates appropriate ethical behavior and adheres to the ICMCI and/or National Institute Code of Professional Conduct and Ethics	Demonstrates appropriate ethical behavior and adheres to the ICMCI and/or National Institute Code of Professional Conduct and Ethics	Acts as a role model for ethical behavior and contributes to the development and maintenance of ethical standards within the profession
E2	Demonstrating professional behavior	E2.1	Is able to identify client's needs and is developing the ability to provide advice to meet those needs	Ensures professional advice is sound and relevant to client's needs	Guides others within the profession in the ways of identifying client needs and how to provide sound and relevant advice
		E2.2	Sets high personal standards, acts with integrity, respects confidentiality, and is courteous, reliable and responsive in dealing with others	Sets high personal standards, acts with integrity, respects confidentiality, and is courteous, reliable and responsive in dealing with others Explains the value of independent objective advice to clients	Acts as a role model in demonstrating high personal standards of integrity and confidentiality

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Ethics and Professionalism

Competence Framework Reference		Range Statements			
Values and Ethical Behavior Competence		Sub-Comp			
Ethics and Professionalism					
		Ref#	Early	Advanced	Profession Leader
E2	Demonstrating professional behavior	E2.3	Understands diversity in the context of consultancy (size of organization and ownership – SMEs v multi-nationals and private, public, and third sector)and is developing ways to manage it	Understands and manages diversity in terms of culture, religion, race and gender	Acts as a role model in managing diversity and coaches others to help their understanding
		E2.4	Develops professional behavior and is assessing the reactions of colleagues to that behavior	Demonstrates behavior that earns the respect of professional colleagues	Is held in high regard by senior members of the profession and is approached by others for professional advice
		E2.5		Applies professional and ethical criteria and withdraws from an engagement that discovers, or causes, illegal activity	

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Personal Interaction (Emotional Intelligence)

Competence Framework Reference		Range Statements			
Values and Ethical Behavior Competence		Sub-Comp			
F. Personal Interaction (Emotional Intelligence) - <i>Takes and maintains responsibility for actions and impact of selected course of action on others. Handles complexity in the operating environment. Interacts effectively with others to achieve desired outcomes. Demonstrates influencing and communication skills.</i>					
		Ref#	Early	Advanced	Profession Leader
F1	Taking responsibility for own actions	F1.1	Understands that one's actions have effects on clients and colleagues when developing solutions and making recommendations	Maintains responsibility to the client to remain within the scope of work. Identifies, and where appropriate notifies colleagues of, issues outside scope of work	Demonstrates responsibility for their own actions, and those of others who work for them, both within and external to the immediate scope of work Is able to maintain a broad view of all issues surrounding the immediate work
F2	Handles complexity	F2.1	Works under supervision in client assignments	Works effectively in complex environments containing value-conflicts and uncertainties, with at most needing only indirect supervision	Advises, coaches and mentors others in the techniques of handling complex issues and dealing with uncertainty

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Personal Interaction (Emotional Intelligence)

Competence Framework Reference		Range Statements			
Values and Ethical Behavior Competence		Sub-Comp			
F. Personal Interaction (Emotional Intelligence) -					
		Ref#	Early	Advanced	Profession Leader
F3	Interacts effectively with others	F3.1	Understands methods to work with others. Assesses the effect of one's personality on working relationships. Builds a network of contacts	Shares views with others, expressing own ideas and thoughts clearly and openly while also being prepared to listen to other, differing, views before reaching conclusions. Where appropriate, uses professional network to seek contributions from others	Acts as a role model in building and maintaining effective working relationships
F4	Demonstrates influencing skills	F4.1	Develops techniques of persuasive verbal and written presentation	Presents ideas to the client convincingly to achieve specific outcomes	Invited to deliver confident and engaging presentations to a wide range of audiences
F5	Demonstrates communication skills	F5.1	Demonstrates communication skills	Conveys ideas and thoughts in a clear focused style using effective verbal, non-verbal, graphical, written and oral communication techniques in formal and informal situations	

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Continued Learning and Development

Competence Framework Reference		Range Statements			
Values and Behavior Competence		Sub-Comp			
G. Continued Learning and Development - <i>Plans self-development and shows track record of personal growth</i>					
		Ref#	Early	Advanced	Profession Leader
G1	Self development	G1.1	Follows a detailed and comprehensive Continuing Professional Development Program	Identifies opportunities and sets personal objectives for a tailored Continuing Professional Development Program	Seeks technical expertise in new sectors, shares knowledge in many forums
		G1.2	Follows a detailed and comprehensive Continuing Professional Development Program	Pro-actively seeks opportunities to further own development Seeks and acts on feedback from clients, superiors, peers and team members to further personal development Learns from own and others' past assignments	
	Actively seeks out new and appropriate tools	G1.3	Develops awareness of a range of consultancy tools and techniques	Demonstrates a logical process, as part of Personal Development, to seek out new tools and techniques and identify their relevance to current and future work	Can advise others on appropriate sources of knowledge for personal development. May engage in tailoring and development of new tools

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THE IMC USA PROFESSIONAL CODE OF ETHICS

All IMC USA members and Certified Management Consultants® (CMCs) pledge in writing to abide by the Institute's Code of Ethics and voluntarily agree to be self-disciplined.

My Commitment to My Clients

- 1.0** I will serve my clients with integrity, competence, independence, objectivity, and professionalism.
- 2.0** I will mutually establish with my clients realistic expectations of the benefits and results of my services.
- 3.0** I will only accept assignments for which I possess the requisite experience and competence to perform and will only assign staff or engage colleagues with the knowledge and expertise needed to serve my clients effectively.
- 4.0** Before accepting any engagement, I will ensure that I have worked with my clients to establish a mutual understanding of the objectives, scope, work plan, and fee arrangements.
- 5.0** I will treat appropriately all confidential client information that is not public knowledge, take reasonable steps to prevent it from access by unauthorized people, and will not take advantage of proprietary or privileged information, either for use by myself, the client's firm, or another client, without the client's permission.
- 6.0** I will avoid conflicts of interest or the appearance of such and will immediately disclose to the client circumstances or interests that I believe may influence my judgment or objectivity.
- 7.0** I will offer to withdraw from a consulting assignment when I believe my objectivity or integrity may be impaired.
- 8.0** I will refrain from inviting an employee of an active or inactive client to consider alternative employment without prior discussion with the client.

My Commitment to Fiscal Integrity

- 9.0** I will agree in advance with a client on the basis for fees and expenses and will charge fees that are reasonable and commensurate with the services delivered and the responsibility accepted.
- 10.0** I will not accept commissions, remuneration, or other benefits from a third party in connection with the recommendations to a client without that client's prior knowledge and consent, and I will disclose in advance any financial interests in goods or services that form part of such recommendations.

My Commitment to the Public and the Profession

- 11.0** If within the scope of my engagement, I will report to appropriate authorities within or external to the client organization any occurrences of malfeasance, dangerous behavior, or illegal activities.
- 12.0** I will respect the rights of consulting colleagues and consulting firms and will not use their proprietary information or methodologies without permission.
- 13.0** I will represent the profession with integrity and professionalism in my relations with my clients, colleagues, and the general public.
- 14.0** I will not advertise my services in a deceptive manner nor misrepresent or denigrate individual consulting practitioners, consulting firms, or the consulting profession.
- 15.0** If I perceive a violation of the Code, I will report it to the Institute of Management Consultants USA and will promote adherence to the Code by other member consultants working on my behalf.

Approved by the IMC USA Board of Directors February 3, 2005

Certification Questions About The Core Competencies for Management Consultants

Question set 1: Professional engagement of services

Competency Reference Number	Typical Question asked during the certification process	Comment
C1	Consulting Business Insight – Assignment Commercial Aspects How do you market and sell your consultancy services?	The ability to generate new business, through individual initiative, by establishing a broad network of contacts and knowing when and how to sell ideas and services to others. The ability to establish and run a consulting business, an internal consultancy, or a consulting practice as part of a larger firm
C2	Ethics and Professionalism How do you assure the client of your integrity and competence as a consultant and define your specialty?	The ability to establish the trust of the client in you. In doing this, you will show your respect for the culture and values of the client and their organization. You must also ensure that client confidentiality is maintained. You must convince your clients that you have integrity and approach your work in an ethical fashion. A belief in one's own capability to accomplish objectives and select an effective approach to complete tasks or problems. This includes confidently expressing decisions and opinions in challenging circumstances.

These are examples of the types of questions that may be asked on written certification exams and peer review panels. It should be noted that the Institute may include an extra competency questions related to this section to find the extent of cross-cultural awareness of the candidates. This will cover the various business, ethnic and national cultures.

Question set 2: How do you successfully manage your relationship with a client?

These questions cover relationships with the client throughout the lifecycle of the individual intervention and over the course of the business relationship.

Reference Number	Typical Question asked during the certification process	Comment
C3	<p>Engagement Management– Client Focus – Scoping Client Requirements</p> <p>How do you approach new clients and develop mutual understanding with a potential client about the possibilities for an appropriate intervention?</p>	<p>The ability to develop a rapport with client while keeping the discussions focused on the client’s needs and requirements. You must be able to provide the client with a realistic assessment of what you and your organization can do. A desire to serve clients by focusing one’s efforts on discovering and meeting the client’s real needs.</p>
C4	<p>Engagement Management– Client Focus – Scoping Client Requirements</p> <p>How do you approach new clients and develop mutual understanding with a potential client about the possibilities for an appropriate intervention? How do you ensure that the client shares your perception of their situation?</p>	<p>The ability to take a “whole organization” view of both the presenting situation/problem and the options to deal with it.</p>
C5	<p>Consulting Competence – Consulting Process Techniques</p> <p>How do you present your proposals to a client?</p>	<p>The ability to present the proposal to the right people using the appropriate media. You need to be able to explain the proposal clearly, in particular being able to explain technical aspects clearly to non-experts. When discussing the proposal with technical experts, you need to be able to display the appropriate level of expertise and knowledge. You also need to respond to client comments or questions on the proposals. You should be able to persuade, convince or influence others in order to gain agreement, win support or transfer ownership of ideas or concepts.</p>

Question set 2: How do you successfully manage your relationship with a client?

These questions cover relationships with the client throughout the lifecycle of the individual intervention and over the course of the business relationship.

Reference Number	Typical Question asked during the certification process	Comment
C6	<p>Consulting Competence – Assignment Management – Managing Successful Outcomes How do you conclude the negotiation with the client and how are the details of the agreement recorded?</p>	The ability to ensure that you are the right person from your organization to conduct the negotiation, and you need to know in advance what aspects of the proposal are susceptible to modification yet still meet the requirements of both organizations. The ability to bring two or more parties to an acceptable agreement.
C7	<p>Consulting Competence – Assignment Management – Managing Successful Outcomes How are the contractual arrangement and fee basis agreed with the client?</p>	The ability to reach agreement and ensure that all relevant aspects of the discussion and agreed terms and conditions are clearly recorded.
C8	<p>Values and Ethical Behavior Behaviors – Personal Interaction – Influencing Skills How do you build on the initial rapport created with the client to produce a professional working relationship throughout the term of the assignment (and on-going if appropriate)?</p>	The ability to remain in control of the interaction and consciously and deliberately move between roles to meet the accurately hear and understand the unspoken or partly expressed thoughts, feelings and concerns of others. The ability to focus on customer needs to ensure the highest level of service is provided.
C9	<p>Consulting Competence – Risk and Quality Management How do you introduce, plan and control change management with a client?</p>	The ability to clarify why an intervention is planned, and how it aims to affect the performance of the client organization. You need to identify technical aspects of what is proposed and work out which people and departments from the client organization will need to be involved with which aspects of the activity. It is the ability to get behind formal organization charts to understand the key working relationships and to identify key influences and decision-makers as a basis for planning the most effective influence strategies.
C10	<p>Consulting Competencies – Assignment Management – Managing Handover To Client The process by which you enable your client to take ownership of the developments which you have introduced in the intervention.</p>	The ability to be able to work with the client to help them see that they can implement and cope with change. You must be able to encourage the client to find new ways of perceiving the meaning of data information, and help them develop objective appraisal of their aims and objectives.
C11	<p>Consulting Competencies – Assignment Management – Managing Handover To Client How do you manage withdrawal from the client?</p>	The ability to be able to work with the client to help them see that they can implement and cope with change. You must be able to encourage the client to find new ways of perceiving the meaning of data information, and help them develop objective appraisal of their aims and objectives.

Question set 3: How do you successfully undertake an intervention?

These questions address the process steps used in approaching assignments.

Reference Number	Typical Question asked during the certification process	Comment
C12	Consulting Competence – Tools & Methodologies How do you apply appropriate diagnostic tools to determine the current position of the client?	The ability to develop an objective view of the client's need, drawn from a structured and thorough review of available data. An ability to assess the client's real and presenting need, using relevant evaluation techniques.
C13	Engagement Management – Client Focus – Scoping Client Requirements How do you scope the intervention?	The ability to display a command of technical specialty (s) and the ability to apply them to suit client situations, recognizing the constraints within which the client has to operate.
C14	Engagement Management – Client Focus – Scoping Client Requirements How do you prepare a proposal for a client?	The ability to ensure that the understanding of the client's situation and opinions is accurate, and that the proposals developed meet the identified needs. An ability to ensure that each proposal explains the scope of the work to be carried out, and the methods to be used. Proposals should build on best practice and also allow for innovation and creativity. The aims, objectives and achievement criteria for the project should be clearly identified.
C15	Engagement Management – Client Focus – Scoping Client Requirements How do you determine the potential of each option with the client, while ensuring that you (or your practice) are able to deliver everything suggested within each option?	An ability to identify what existing ways there are of achieving the aims and objectives and consider what innovations to them are needed. The development of new methods needs also to be considered. In defining the objectives, you need to be able to evaluate where the client is now and how they will move forward to meet the aims and objectives.
C16	Consulting Competence – Assignment Management – Managing Successful Outcomes How do you implement the agreed intervention and manage the client's expectations according to the agreed plan?	The ability to understand how the client expects you to work together with them, and find ways to build rapport and trust with clients. The ability to understand the effect that the client themselves will have on the interactions between you, and the ability to adopt the most appropriate role at different times during interactions.
C17	Consulting Competence – Consulting Knowledge – Applying Knowledge How do you identify suitable and accurate sources of information, and the methods of obtaining it?	The ability to make use of information. Driven by an underlying curiosity to understand the casual factors in any situation. This means digging beneath the surface and ensuring that hypotheses about situations are well founded on facts.

Question set 4: How do you make sure you can deliver an assignment?

These questions address how you manage your resources to ensure quality.

Reference Number	Typical Question asked during the certification process	Comment
C18	<p>Consulting Competence – Consulting Knowledge – Apply Knowledge Your ability to make a clear and appropriate analysis of information which is used in the decision making process within a consultancy context.</p>	The ability to understand complex problems and situations by analyzing a large volume of information in a systematic and logical way. the ability to understand information, distil out key points, draw logical conclusions and make appropriate decisions or recommendations.
C19	<p>Consulting Skills – Assignment Management – Managing Successful Outcomes and Planning How do you plan the use of physical resources with the client to meet the objectives of your assignment?</p>	The ability to coordinate the acquisitions and assembly of resources, having negotiated resource allocation and use with the right people. You need to be able to ensure that the resources are there when they are needed, and you need to be able to plan for shortfalls. An ongoing aspect is the evaluation of the use of and performance of resources.
C20	<p>Consulting Skills – Assignment Management – Managing Successful Outcomes and Planning How you would ensure sufficient client staff resources with appropriate skills to meet the objectives of your assignment?</p>	The ability to decide with your team how to distribute tasks and responsibilities. You need to make sure this allocation makes best use of team members' abilities, and provide opportunities for them to learn and develop in their roles.
C21	<p>Consulting Skills – Assignment Management – Managing Successful Outcomes and Planning How do you explain, establish and monitor the systems, processes and methods necessary for completion of the project? [MR]</p>	The ability to explain what is needed, and to negotiate with those affected to identify who will do what, when and why. You need to be able to continually help people to understand what is expected of them, and also to ensure that what is happening will meet the agreed objectives. This will entail you being able to agree quality and evaluation criteria.
C22	<p>Consulting Competence – Risk and Quality Management How do you ensure that all of the assignment's objectives have been met in full?</p>	The ability to ensure that everything starts when it should and everybody knows what they are doing. You must be able to evaluate whether input and output are as intended, and to assess the overall progress against the original plan. You need to work out how to cope when things deviate from the plan, and to take the chance to improve things as they proceed.
C23	<p>Consulting Competence – Risk and Quality Management How do you assess your own performance during the assignment?</p>	The ability to assess your current performance, identify, plan and take action to meet your development needs. The drive to achieve results by setting and exceeding challenging objectives and goals, to make continual improvements, a determination to overcome obstacles and setbacks, to evaluate courses of action terms of their potential return on resources invested.
C24	<p>Consulting Skills – Assignment Management – Managing Successful Outcomes and Planning How do you manage your time within the assignment?</p>	The ability to agree and prioritize your objectives, plan your time, delegate responsibilities to others, take decisions, and review and reschedule your activities appropriately. The ability to identify what needs to be done to achieve objectives, prioritize and establish plans to ensure an effective outcome.

Question set 4: How do you make sure you can deliver an assignment?

These questions address how you manage your resources to ensure quality.

Reference Number	Typical Question asked during the certification process	Comment
C25	<p>Consulting Competence – Risk and Quality Management Your ability to select and put into place suitable systems for recording, storage and retrieval of information within a consultancy context.</p>	The ability to collect, store and manage information to monitor and improve business efficiency and effectiveness.
C26	<p>Values and Behavior Competence – Personal Interaction – Communications Skills How do you advise, educate and inform colleagues and clients on the basis of your analysis of information within a consultancy context?</p>	The ability to establish productive working relationships and find ways of improving relationships with colleagues at all levels within your consulting practice, or your consulting team, and in the client organization. You should keep appropriate people informed at the right level of detail about relevant issues, and provide people with accurate information. The ability to expand and use technical knowledge or to disseminate knowledge and technical expertise to others.
C27	<p>Business and Technical competence – Consulting Business Insight – Commercial Aspects of Assignments The use of appropriate techniques to manage financial resources within a consultancy context.</p>	The ability to allocate, manage and monitor financial resources.
C28	<p>Business and Technical competence – Consulting Business Insight – Commercial Aspects of Assignments How sufficient and appropriate are the consultancy hours that can be made available to fulfill the requirements of the project [MR]?</p>	The ability to agree and prioritize your objectives, plan your time, delegate responsibilities to others, take decisions, and review and reschedule your activities as appropriate.
C29	<p>Values and Behavior Competence – Manages Complexity How do you resolve conflicts within the parameters of an assignment?</p>	The ability to work within your consulting practice's and client's systems and procedures and deal with conflicts and complaints to rectify what has happened and maintain client goodwill.



Certification Scheme Consulting Experience

A CMC® candidate must be currently active in consulting: able to demonstrate that in three of the last five years management consulting has been a significant part of his or her activity. This can include consulting with clients; selling, managing and / or supporting consulting activity; preparing for and teaching consultancy; publishing and writing on consulting, technical specialties, client business segments, and related topics



Certification Scheme

IMC USA is an ISO/IEC 17024:2003 Certifying Body for the CMC®

Candidates for the Certified Management Consultant™ (CMC®):

- Pledge in writing to abide by the Institute's Code of Ethics
- Their professional competence is verified by:
 - Education and consulting experience
 - Client evaluations
 - Summaries of client assignments
 - Written examinations on Ethics and Consulting Competencies
- An oral examination administered by qualified CMC®s

Certification Scheme Education



A CMC[®] candidate must have earned a Bachelor's degree.

A candidate without a Bachelor's degree may apply for certification if they have a minimum of five years of experience as an independent or internal management consultant, provided they can demonstrate an ongoing commitment to professional development in management, the consulting profession and their area of specialty.



Certification Scheme References

The CMC[®] candidate must provide multiple references, most of them officers or executives of client organizations served.

These references are consulted to assure that the consulting relationship met the clients' objectives using a formal client evaluation.



Certification Scheme

Summaries of Client Assignments

The CMC[®] candidate must provide written summaries of client assignments linked to their references with respect for client confidentiality.



Certification Scheme Ethics & Consulting Competency Exams

The CMC[®] candidate must pass written ethics and consulting competency exams.

These exams are usually administered online.



Certification Scheme

Oral Examination

The CMC[®] candidate must pass an oral examination conducted by qualified CMC[®]s, demonstrating professional competence and current knowledge in areas of specialization, application of experience, ethical behavior and understanding of the management consulting process.

In the event a candidate fails a section of the Oral Examination, they may retake that section after an appropriate period of preparation or may appeal to the IMC USA Board of Directors.



Application Streams: Basic, Advanced and Management

Recognizing a candidate's years of experience, there are three paths to certification:

- **Basic** for 3 through 9 years of consulting experience
- **Experienced** for 10 years of more of consulting experience
- **Management** for high level managers in non-consulting companies with 3 or more years of consulting experience who have been accountable and successful in major projects that involve consultants

After a review of the application, the CMC® Certification Committee may waive the written or oral examination core competency sections for the Advanced and Management streams.

CMC® Recertification



Every three years, a CMC® renews his or her certificate by demonstrating continued professional development through:

- Professional Education
- Client Engagements and Practice Development
- Community Outreach
- Ethics Education

IMC USA's Competency Framework and Certification Scheme for Certified Management Consultants™ (CMC®)

Institute of Management Consultants USA

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Approved by: CMC Certification Committee (ISO/IEC 17024:2003 scheme committee)

Change record:

Rev.	Date	Responsible Person	Description of Change
1	Oct 2002	Bryan Pergoff CMC	Initial Release "Cert Standard -1 Eligibility"
2	December 2004	Robert Sopo CMC	Re-examination process
3	May 12, 2008	Don Scellato CMC	Candidates without bachelor degrees
4	June 18, 2010	Clint Burdett CMC	Combined with IMC USA Competency Framework, multiple streams, title change
5	January 23, 2015	Don Scellato CMC FIMC	Aligned time requirement with ICMCI.
6	May 5, 2015	Don Scellato CMC FIMC and Wayne Outlaw CMC	IMCUSA Board May 5, 2015 - Approved adoption of ICMCI Core Competency Framework Ranges as IMC USA Standard
9	Sept 29, 2016	Don Scellato CMC FIMC and Wayne Outlaw CMC	Revised and replaced Competency Description and alue to Client Pages

Related Documents:

1. ISO/IEC 17024:2003 General Requirements for Bodies Operating Certification of Persons
2. International Council of Management Consulting Institutes (ICMCI) Professional Standard 3 and its Appendix A

This work is a derivative of parallel works created by members of IMC USA, ICMCI, CMC Canada, UK Institute of Consulting, Institute of Consultants South Africa, ICMCI Professional Standards Committee, ICMC Quality Assurance Committee, and other parties to be named as information is received. These parallel works have resulted in the ICMCI Set of Standards contained in this document and created by the ICMCI Professional Standards Committee members in their meetings.

The version of the ICMCI Professional Standards adopted by IMC USA is the latest revision carried out by expert consultants and reviewed by both the Professional Standards Committee and Quality Assurance Committee of the ICMCI. The Trustees approved the update on January 24 2014.