

# 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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[www.IMCUSA.org](http://www.IMCUSA.org)



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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 – development (consultant), independence (management consultant) and mastery (CMC), all underpinned by professional behaviors and ethics.

This framework builds on the initial work undertaken by the International Council of Management Consulting Institutes in developing the CMC® qualification during 2006, and was further expanded by the Institute of Management Consultancy (UK) into a broader and more robust model which reflects leading practices across the profession.

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

- Have at least 3 years experience as a consultant;
- 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 the work which has been put into document by both its members and those of the Institute of Management Consultancy (UK), upon who work this document is based.



# A Higher Standard of Competence and Performance

Developmental Stage	Early	Advanced	Mastery
<b>Expertise</b>	Provides technical skills/ experience to a project. Developing skills defined by Common Body of Knowledge and Competency Framework.	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
<b>Scope</b>	Narrow specialty in a technical discipline / industry	Applies expertise across industries and disciplines	Creates new approaches to applying expertise across industries and disciplines
<b>Organization focus</b>	Tactical support to middle mgrs	General business advice to managers and executives	Broad strategic advice to senior managers and executives/Board of Directors
<b>Value to Client</b>	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
<b>Commitment to Profession</b>	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	Member of IMC USA and bound to IMC USA Code of Ethics. Has obtained CMC® certification. Actively contributes to profession
<b>Experience</b>	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 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

- Market Capability & Knowledge

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.

- Professional Skills and Behaviors, and Ethics

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 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, 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 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

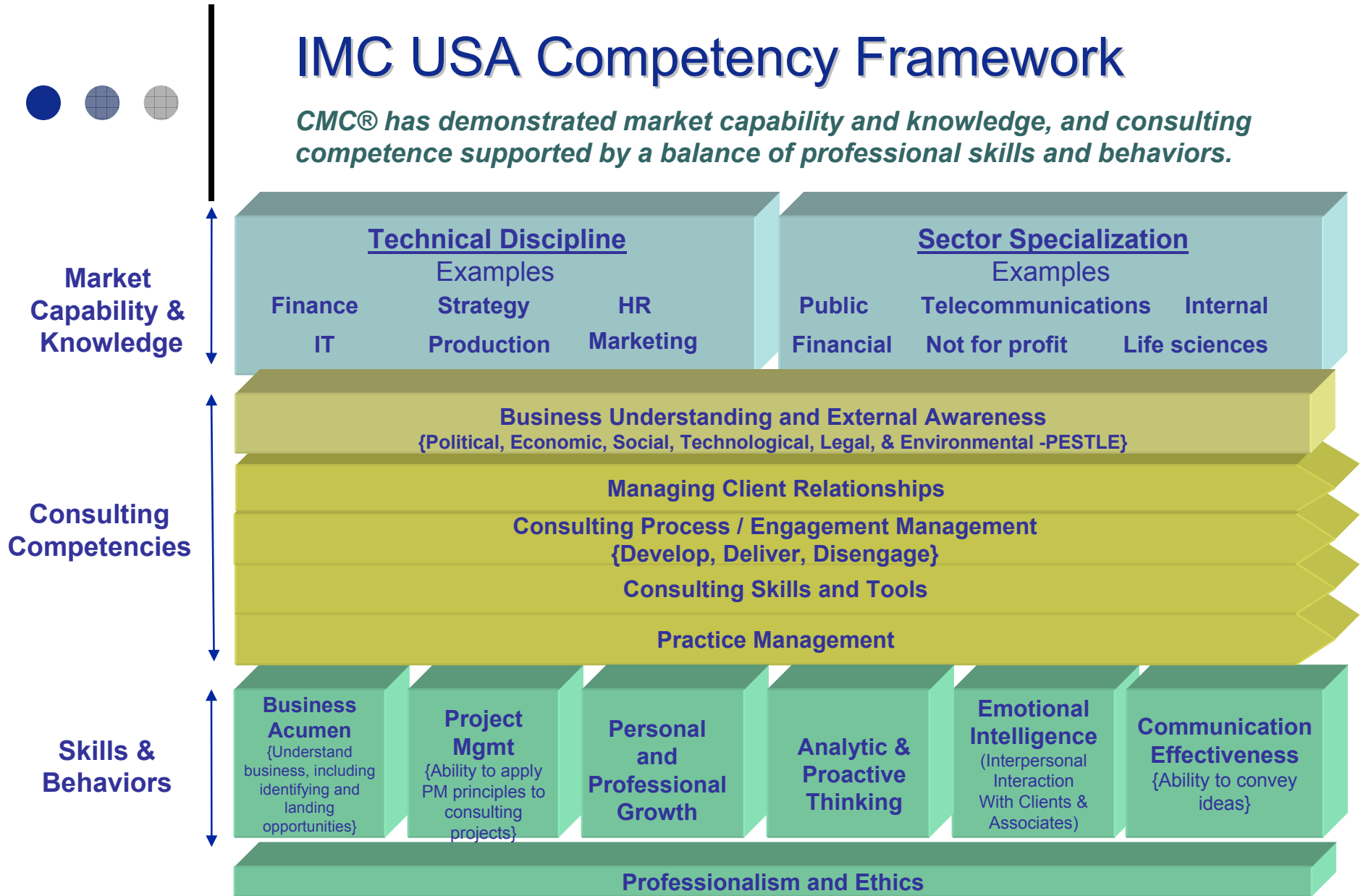
Some initial observations ...

- The boundaries of what constitutes management consulting are becoming blurred. Larger consultancies are offering services spanning strategy to outsourcing
- There are low barriers to 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 adults
- The value of information is diminishing as availability increases. Effective sourcing and application of knowledge is becoming a differentiator

This competence framework builds on the current CMC 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.

# IMC USA Competency Framework

*CMC® has demonstrated market capability and knowledge, and consulting competence supported by a balance of professional skills and behaviors.*







# Professional Skills & Behaviors

Skills & Behaviors



Professional skills & behaviors act as the enablers to achieve market capability and consulting competence. They include professionalism and ethics. They are entry level prerequisites for becoming a successful consultant.



# Professional Skills & Behaviors

## Professionalism and Ethics

Operates with professionalism and integrity in all aspects of role including conduct, appearance, adherence to codes of practice and working in the best interests of the client.

## Demonstrated Behaviors

- Adheres to IMC USA's Codes of Professional Conduct
- Deals appropriately with ethical issues and adheres to the Institute's Ethical Guidelines
- Ensures professional advice given is technically sound and relevant to client needs
- Sets high personal standards
- Acts with integrity
- Values diversity in terms of culture, religion, race and gender
- Is courteous, reliable and responsive in dealing with others
- Respects confidentiality
- Engenders trust
- Is respected by professional colleagues



# Professional Skills & Behaviors

## Business Acumen

Understands how client's and own business operates, including identifying and landing opportunities

## Demonstrated Behaviors

- Understands and demonstrates how to operate a business effectively.
- Understands client's business model and business models of client's competitors.
- Understands political, economic, social, technological, legal, and environmental context of client's business.
- Keeps abreast of changing business environments and trends in management consulting and in client's business sector
- Understands how to incorporate external changes and trends into client's and own business models and processes
- Ability to view client's business processes with a holistic perspective (how well they serve the client's customers, employees, stakeholders, and investors in delivering products and services efficiently and effectively).



# Professional Skills & Behaviors

## Project Management

Ability to apply Project Management principles to consulting projects

## Demonstrated Behaviors

- Establishes objectives and deliverables with client
- Defines project schedule and accountability for delivery of objectives
- Establishes project change control procedures with client
- Defines communications plan and reporting procedures for project
- Defines disengagement plan for project
- Manages consulting project within the context established above
- Effectively manages client's expectations at all stages of project



# Professional Skills & Behaviors

## Analytic and Pro-active Thinking

Applies analytical and proactive thinking to client agenda to ensure robust, appropriate client solutions.

## Demonstrated Behaviors

- Adopts a logical, coherent and consistent approach to problem solving
- Understands the alternative implications of different issues and courses of action
- Recommendations are supported by facts and research
- Makes decisions on a rational and timely basis
- Challenges assumptions and probes detail
- Develops and tests mental models to ensure practical application
- Demonstrates flexibility, creativity and innovation in generating solutions and recommendations



# Professional Skills & Behaviors

## Personal and Professional Growth

Proven track record of self-development and personal growth.

## Demonstrated Behaviors

- Demonstrates awareness of own development needs and opportunities
- Pro-actively seeks opportunities to further own development
- Recognizes impact of own behavior on others
- Seeks and acts on constructive feedback from clients, peers and team members to further personal development
- Sets and monitors personal learning and development objectives



# Professional Skills & Behaviors

## Emotional Intelligence

Demonstrates ability to perceive, assess, and manage the one's own emotions, as well as those of others and groups.

Assumes responsibility for own actions, understanding complexity of operating environment.

Demonstrates resiliency, drive, and commitment to results.

## Demonstrated Behaviors

- Acts on own initiative, seeking help where required
- Persists with job until complete solution has been delivered
- Calm and rational approach when under pressure
- Flexible and adaptable to changing demands and deadlines
- Manages ambiguity
- Keeps 'big picture' in focus, simultaneously addressing detail
- Balances priorities, managing time effectively
- Demonstrates responsibility for actions which extend beyond the immediate area of scope
- Develops thought-through courses of action which take into account issues beyond the immediate scope of roles
- Works effectively in complex environments containing value-conflicts and uncertainties which extend beyond the immediate area of practice
- Works effectively in a variety of corporate, national, and ethnic cultures



# Professional Skills & Behaviors

## Communications Effectiveness

Interacts and empathizes effectively with others to achieve desired outcomes.

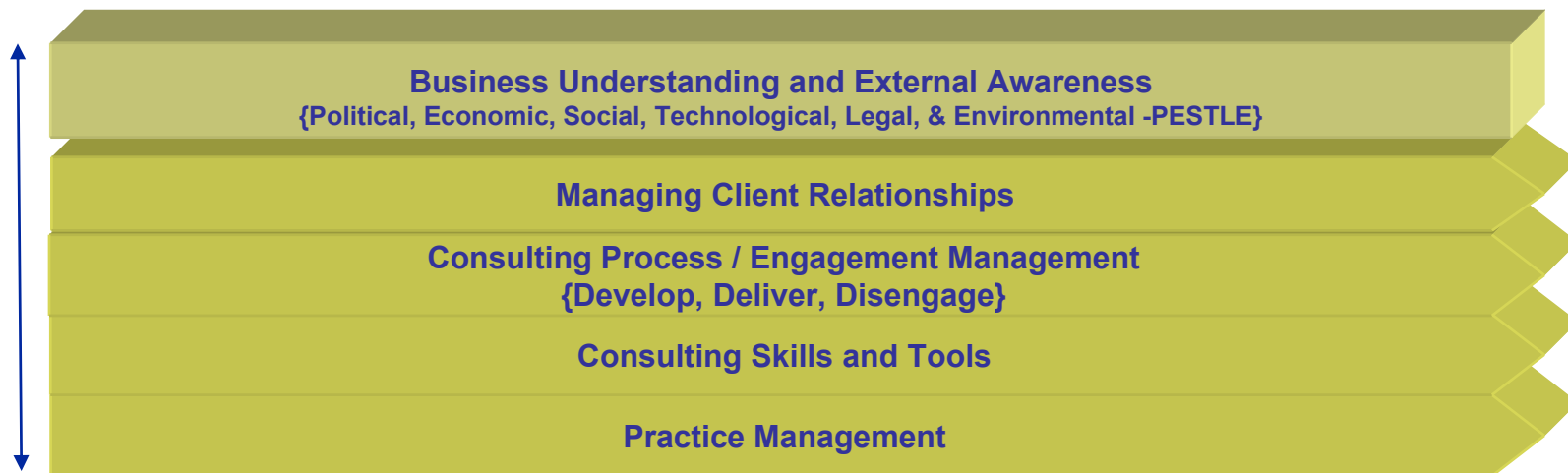
## Demonstrated Behaviors

- Selects appropriate communications tools in interactions with client management and consulting teams
- Establishes and maintains productive working relationships
- Is confident and assured
- Willingness to understand alternative perspectives
- Expresses views clearly and openly and without arrogance
- Contributions actively sought from others
- Seeks to build solutions of mutual benefit





# Consulting Competencies



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



# Managing Client Relationships - Develop

1.0 Managing Client Relationships	Early	Advanced	Mastery
<b>1.1 Scoping client requirements</b>	<ul style="list-style-type: none"> <li>• Researches and understands client agenda and issues</li> <li>• Understands purpose and content of client proposals</li> <li>• Contributes to written proposals</li> <li>• Ensures the client's vision of the engagement matches that of the consultant.</li> </ul>	<ul style="list-style-type: none"> <li>• Understands and defines client requirements</li> <li>• Presents clear comprehensive written proposals</li> <li>• Engages the client in selecting and owning optimal design options</li> </ul>	<ul style="list-style-type: none"> <li>• Utilizes knowledge of external issues and depth of experience to inform, challenge and define scope of work</li> </ul>
<b>1.2 Managing client interface</b>	<ul style="list-style-type: none"> <li>• Establishes a written or oral contractual agreement with client that describes the terms of engagement and scope of the project</li> <li>• Understands and operates within contractual terms of engagement</li> </ul>	<ul style="list-style-type: none"> <li>• Manages stakeholder expectations, maintaining focus on overall deliverables, and agreeing and applying contractual terms of engagement</li> </ul>	<ul style="list-style-type: none"> <li>• Owns, leads and manages complex client bids and proposal teams</li> <li>• Depth of experience in contract formulation and negotiation</li> </ul>
<b>1.3 Partnering and networking</b>	<ul style="list-style-type: none"> <li>• Develops network to support and add value to client engagements, including within own company, clients and external professional networks</li> </ul>	<ul style="list-style-type: none"> <li>• Understands and engages expertise of others alongside own.</li> <li>• Leverages network effectively to research and define client issues, generate innovative solutions for clients and/or inform delivery solution</li> </ul>	<ul style="list-style-type: none"> <li>• Leverages effective, established networks to create added value for clients</li> </ul>





# Managing Client Relationships – Deliver – Achieving Sustainable Results

1.0 Managing client relationships (continued)	Early	Advanced	Mastery
<p><b>1.6 Facilitation</b></p>	<ul style="list-style-type: none"> <li>• Contributes constructively to group situations</li> </ul>	<ul style="list-style-type: none"> <li>• Manages group processes to achieve desired outcomes, using tools and techniques to maximize the group’s decision-making potential</li> </ul>	<ul style="list-style-type: none"> <li>• Manages complex, high risk, group dynamics, conflicts and concerns to promote win-win outcomes</li> </ul>
<p><b>1.7 Managing and developing others</b></p>	<ul style="list-style-type: none"> <li>• Works with others to develop mutually supportive relationships</li> <li>• Supports and encourages positive team working behaviors in others</li> </ul>	<ul style="list-style-type: none"> <li>• Manages, develops and appraises others, delegating where appropriate</li> <li>• Seeks support from peers where appropriate</li> </ul>	<ul style="list-style-type: none"> <li>• Draws on a range of leadership styles to ensure effective development of others</li> <li>• Proactively coaches and develops others</li> <li>• Manages large (&gt;20) complex teams operating across cross-cultural boundaries</li> </ul>



# Consulting Process – Deliver - Achieving Sustainable Results

2.0 Consulting Process - Achieving sustainable results	Early	Advanced	Mastery
2.1 Planning & management	<ul style="list-style-type: none"> <li>• Manages own delivery under the guidance of more experienced colleagues</li> <li>• Plans and manages own time ensuring own deliverables are completed to required timescales and budget</li> <li>• Works in one or more stages of project delivery</li> </ul>	<ul style="list-style-type: none"> <li>• Manages client projects effectively ensuring objectives, deadlines and budgets are met by team members under own control</li> <li>• Competent use of project planning, tools, milestones appropriate for the size and scale of the project</li> <li>• Demonstrates the ability to assess, form and allocate work streams, managing own time and that of others to meet deadlines</li> <li>• Operates competently in all areas of project delivery</li> </ul>	<ul style="list-style-type: none"> <li>• Ensures realistic objectives</li> <li>• Advises on delivery design and implementation</li> <li>• Reviews and advises on project plans</li> <li>• Serves as 'delivery assurance' on complex projects</li> </ul>
2.2 Managing risk	<ul style="list-style-type: none"> <li>• Manages 'low risk' projects (low complexity, acting as sole consultant)</li> <li>• Pro-actively identifies and communicates issues impacting progress of own work and that of client</li> <li>• Requests advice in achieving milestones</li> </ul>	<ul style="list-style-type: none"> <li>• Manages 'medium risk' projects (working with others, high complexity)</li> <li>• Identifies, quantifies and manages issues impacting on delivery of project</li> </ul>	<ul style="list-style-type: none"> <li>• Manages 'high risk' projects with significant change (major clients, multi-disciplinary teams)</li> </ul>



# Consulting Process – Deliver / Disengage

## Achieving Sustainable Results

2.0 Consulting Process - Achieving sustainable results (continued)	Early	Advanced	Mastery
2.3 Ensuring quality	<ul style="list-style-type: none"> <li>Complies with agreed engagement and quality management processes and standards</li> <li>Demonstrates pro-activity in seeking feedback and acting upon it</li> <li>Builds track record of successful delivery in a range of support roles in client engagements</li> </ul>	<ul style="list-style-type: none"> <li>Demonstrates track record of successful delivery in a range of delivery roles in client engagements</li> <li>Ensures quality of own deliverables and those of team</li> <li>Monitors and measures client satisfaction</li> </ul>	<ul style="list-style-type: none"> <li>Leads quality assurance reviews</li> <li>Advises others on design of quality assurance process</li> </ul>
2.4 Managing disengagement	<ul style="list-style-type: none"> <li>Shows the ability to draw to a close own deliverables</li> <li>Engages client to take ownership of specific deliverables</li> </ul>	<ul style="list-style-type: none"> <li>Works with the client to determine a handover process to ensure skills transfer, sustainability of results and knowledge capture as appropriate for project</li> <li>Reviews and predicts any potential areas of deficit, addressing them before the engagement ends</li> </ul>	<ul style="list-style-type: none"> <li>Leads and advises others on design of withdrawal process</li> </ul>



# Consulting Skills and Tools

3.0 Consulting Skills & Tools	Early	Advanced	Mastery
<b>3.1 Tools and methodologies</b>	<ul style="list-style-type: none"> <li>• Develops awareness of a range of diagnostic tools</li> <li>• Tests client hypotheses and solutions with robust data</li> </ul>	<ul style="list-style-type: none"> <li>• Selects and uses appropriate diagnostic tools, methods and techniques</li> <li>• Actively seeks out new and appropriate tools</li> </ul>	<ul style="list-style-type: none"> <li>• Advises on use of a range of diagnostic tools, methods and techniques</li> <li>• Tailors existing and develops new tools</li> <li>• Develops and selects appropriate methods in unclear situations</li> <li>• Teaches others on consulting tools and methods</li> </ul>
<b>3.2 Applying knowledge</b>	<ul style="list-style-type: none"> <li>• Identifies and uses wide range of knowledge sources</li> <li>• Analyses data and effectively presents to support proposed solutions</li> <li>• Accesses a wide range of knowledge sources relevant to client needs</li> </ul>	<ul style="list-style-type: none"> <li>• Captures and builds knowledge in defined processes</li> <li>• Shares knowledge and experiences with others</li> <li>• Applies knowledge, tools and technical expertise to support value creation, tailoring it to the specific needs of the client</li> </ul>	<ul style="list-style-type: none"> <li>• Perceived as thought leader in chosen field</li> <li>• Actively sought by others for knowledge and expertise</li> <li>• Relationship with client is preceded by an acknowledged expertise in field</li> <li>• Applies knowledge to architect complex, innovative solutions which deliver value to clients</li> </ul>



# Practice Management

4.0 Practice Management	Early	Advanced	Mastery
<p><b>4.1 Capable of managing a consulting practice (Solo Practitioner, Partner of Consulting Firm, Leader of Consulting Team, Participant in Virtual Consulting Group or Firm)</b></p>	<p><b>Independent Consultant</b></p> <ul style="list-style-type: none"> <li>• Selects business structure that is appropriate for practice</li> <li>• Has formulated and executed measurable Business, Financial, and Marketing Plans</li> <li>• Has established a network of resources to assist with management of practice and execution of projects too complex for solo practitioner</li> <li>• Searches out processes for finding, selling, and reaching agreement with clients for consulting projects</li> </ul> <p><b>Internal Consultant</b></p> <ul style="list-style-type: none"> <li>• Is knowledgeable about business structure and processes of consultant's employer.</li> <li>• Is involved in business planning process for employer</li> <li>• Has established a network (internal and external to employer) to assist with projects too complex for individual consultant</li> </ul>	<p><b>Independent Consultant</b></p> <ul style="list-style-type: none"> <li>• Has established a visible, physical presence for own practice</li> <li>• Has managed personal risk associated with practice</li> <li>• Has developed value added materials to support practice</li> <li>• Follows standard processes for reaching agreement with clients to perform consulting projects including scope of work and fees.</li> </ul> <p><b>Internal Consultant</b></p> <ul style="list-style-type: none"> <li>• Has established a reputation within employer's business as a competent consultant</li> <li>• Has participated in selling projects to existing clients and in finding new clients for employer</li> <li>• Is responsible for a portion of employers business planning or budgeting process</li> </ul>	<p><b>Independent Consultant</b></p> <ul style="list-style-type: none"> <li>• Has successfully operated a consulting practice for at least 3 years</li> <li>• Is recognized in client and consultant community as a competent consultant and is referred by clients and peers for projects</li> </ul> <p><b>Internal Consultant</b></p> <ul style="list-style-type: none"> <li>• Is conversant with financial reporting and management of employer's firm</li> <li>• Is part of employer's management team</li> </ul>





# Practice Management

4.0 Practice Management	Early	Advanced	Mastery
<b>4.2 Capable of Managing a Variety of Projects (Internal or External Consultant)</b>	<ul style="list-style-type: none"> <li>• Has participated in complex projects as a team member</li> <li>• Has completed projects as sole consultant on project</li> </ul>	<ul style="list-style-type: none"> <li>• Has led simple, straight forward consulting projects</li> <li>• Has led portions of complex projects as part of a larger consulting team</li> <li>• Has demonstrated ability to contribute to the success of a consulting or project team</li> </ul>	<ul style="list-style-type: none"> <li>• Has led actual or virtual consulting teams (Consisting of client and consulting team members)</li> <li>• Has been responsible for the success or failure of large, complex consulting projects</li> </ul>



# Business Understanding and External Awareness

5.0 Business Understanding & External Awareness	Early	Advanced	Mastery
<p><b>5.1 Maintains awareness of external conditions that impact client's business and own business</b></p>	<ul style="list-style-type: none"> <li>Keeps current with Political, Economic, Social, Technical, Legal, and Environmental factors in client sector and consulting specialty.</li> </ul>	<ul style="list-style-type: none"> <li>May specialize in certain aspects of PESTLE.</li> <li>Actively seeks out deeper understanding most important aspects of PESTLE that relate to client sector and consulting specialty.</li> </ul>	<ul style="list-style-type: none"> <li>Ensures that all aspects of PESTLE are considered in formulating project plans, executing engagements, and delivering solutions to clients.</li> </ul>
<p><b>5.2 Maintains awareness of the latest trends in business operations of sector of primary clients</b></p>	<ul style="list-style-type: none"> <li>Focuses on business functions within client sector and consulting specialty</li> </ul>	<ul style="list-style-type: none"> <li>Understands latest trends, cross functional processes, and relationships in client sector.</li> </ul>	<ul style="list-style-type: none"> <li>Ensures that clients are aware of latest trends in business operations in their sector and in other sectors that may adapted to the client's sector.</li> </ul>
<p><b>5.3 Applies business understanding and external awareness to executing consulting projects and delivering results to clients</b></p>	<ul style="list-style-type: none"> <li>Demonstrates business understanding and external awareness as part of project team.</li> </ul>	<ul style="list-style-type: none"> <li>Ensures that all participants involved in client and consulting portions of every project apply business understanding and external awareness to the process of seeking solutions and making recommendations</li> </ul>	<ul style="list-style-type: none"> <li>Ensures that all projects undertaken contain steps that enable clients to take advantage of the latest business and operational trends that make sense for the clients.</li> <li>Ensures that the results delivered in each project take into account and overcome any risks associated with PESTLE.</li> </ul>



# Market Capability

6.0 Market Capability	Early	Advanced	Mastery
<b>6.1 Technical expertise</b>	<ul style="list-style-type: none"> <li>Builds technical expertise in selected discipline through qualifications and focused experiential learning</li> </ul>	<ul style="list-style-type: none"> <li>Recognized as expert in own discipline</li> </ul>	<ul style="list-style-type: none"> <li>Acts as a leader / adviser /coach to others in own area of discipline</li> </ul>
<b>6.2 Business understanding</b>	<ul style="list-style-type: none"> <li>Understands core business structures, processes, management and disciplines</li> </ul>	<ul style="list-style-type: none"> <li>Discusses impact of other disciplines on area of work with confidence and knowledge</li> </ul>	<ul style="list-style-type: none"> <li>Has credible depth of knowledge across a range of disciplines and business environments</li> </ul>
<b>6.3 Sector knowledge</b>	<ul style="list-style-type: none"> <li>Demonstrates knowledge of one of more sectors</li> </ul>	<ul style="list-style-type: none"> <li>Applies technical expertise across one or more sectors</li> </ul>	<ul style="list-style-type: none"> <li>Leads by example, applying management and business skills in own business</li> <li>Influences business thinking and agenda in one or more sectors</li> </ul>
<b>6.4 External awareness</b>	<ul style="list-style-type: none"> <li>Demonstrates a good general knowledge of political, economic, social, technological, legal and environmental factors (PESTLE)</li> </ul>	<ul style="list-style-type: none"> <li>Demonstrates up to date knowledge of political, economic, social, technological, legal and environmental factors (PESTLE) impacting on sector and/or technical area of expertise</li> </ul>	<ul style="list-style-type: none"> <li>Expertise is sought by external parties to advise on issues impacting own sector</li> </ul>



# 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	<b>Practice Management</b> How do you market and sell your consultancy services?	<p>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.</p> <p>The ability to establish and run a consulting business, an internal consultancy, or a consulting practice as part of a larger firm</p>
C2	<b>Professionalism and Ethics</b> How do you assure the client of your integrity and competence as a consultant and define your specialty?	<p>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.</p>

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><b>Managing Client Relationships – Scoping Client Requirements</b> How do you approach new clients and develop mutual understanding with a potential client about the possibilities for an appropriate intervention?</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.
C4	<p><b>Managing Client Relationships – Scoping Client Requirements</b> How do you ensure that the client shares your perception of their situation?</p>	The ability to take a “whole organization” view of both the presenting situation/problem and the options to deal with it.
C5	<p><b>Managing Client Relationships – Communications &amp; Presentation</b> How do you present your proposals to a client?</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.



## 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><b>Managing Client Relationships – Managing the Client Interface</b> 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><b>Managing Client Relationships – Managing the Client Interface</b> 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><b>Managing Client Relationships – Influencing</b> 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><b>Managing Client Relationships – Managing the Client Interface</b> 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><b>Consulting Process - Disengagement</b> 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><b>Managing Client Relationships – Managing the Client Interface</b> 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	<b>Consulting Skills and Tools – Tools &amp; Methodologies</b> 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	<b>Market Capability – Business Understanding</b> 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	<b>Managing Client Relationships – Scoping the Client Requirements</b> 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	<b>Managing Client Relationships – Scoping the Client Requirements</b> How do you determine the potential of each option with the client, whilst 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.
C116	<b>Managing Client Relationships – Managing the Client Interface</b> 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	<b>Consulting Skills and Tools – Applying Knowledge</b> 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	<b>Consulting Skills and Tools – Apply Knowledge</b> Your ability to make a clear and appropriate analysis of information which is used in the decision making process within a consultancy context.	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	<b>Consulting Process – Planning and Management</b> How do you plan the use of physical resources with the client to meet the objectives of your assignment?	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	<b>Consulting Process – Planning and Management</b> How you would ensure sufficient client staff resources with appropriate skills to meet the objectives of your assignment?	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	<b>Consulting Process – Planning and Management</b> How do you explain, establish and monitor the systems, processes and methods necessary for completion of the intervention?	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	<b>Consulting Process – Ensuring Quality</b> How do you ensure that all of the assignment's objectives have been met in full?	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	<b>Consulting Process – Ensuring Quality</b> How do you assess your own performance during the assignment?	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	<b>Consulting Process – Planning and Management</b> How do you manage your time within the assignment?	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	<b>Consulting Process – Ensuring Quality</b> Your ability to select and put into place suitable systems for recording, storage and retrieval of information within a consultancy context.	The ability to collect, store and manage information to monitor and improve business efficiency and effectiveness.
C26	<b>Managing Client Relationships – Communications &amp; Presentation</b> How do you advise, educate and inform colleagues and clients on the basis of your analysis of information within a consultancy context?	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	<b>Practice Management</b> The use of appropriate techniques to manage financial resources within a consultancy context.	The ability to allocate, manage and monitor financial resources.
C28	<b>Practice Management</b> How sufficient and appropriate are the consultancy hours that can be made available to fulfill the requirements of the intervention?	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	<b>Practice Management</b> How do you resolve conflicts within the parameters of an assignment?	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

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



Candidates for the Certified Management Consultant<sup>™</sup> (CMC<sup>®</sup>):

- 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<sup>®</sup>s



# Certification Scheme Consulting Experience



A CMC<sup>®</sup> candidate must have a minimum of three years of experience in the full-time practice of independent or internal management consulting, with major responsibility for client projects during at least one of those years.



# Certification Scheme Education



A CMC<sup>®</sup> 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<sup>®</sup> 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<sup>®</sup> candidate must provide written summaries of client assignments linked to their references.



# Certification Scheme Ethics & Consulting Competency Exams



The CMC<sup>®</sup> candidate must pass written ethics and consulting competency exams.

These exams are usually administered online.



# Certification Scheme Oral Examination



The CMC<sup>®</sup> candidate must pass an oral examination conducted by qualified CMC<sup>®</sup>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<sup>®</sup> Certification Committee may waive the written or oral examination core competency sections for the Advanced and Management streams.



# CMC® Certification Renewal



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®)

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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

## 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