



The New Zealand Guide for Aspiring Certified Management Consultants



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The New Zealand Guide for Aspiring Certified Management Consultants

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FOREWORD

The Institute of Management Consultants New Zealand was established in 1971. Over the nearly 50 years since then I believe that internationally management consultancy has evolved through four phases. When it first emerged in the middle decades of the 20th century, management consultants needed to be teachers. Many managers in the post-war years lacked the experience and knowledge of how to run an organization (most had no education and little experience in business) so consultancies provided them with valuable advice as to the technicalities of how to do so.

A second phase developed in the later 1970s. As managers gained experience and educational programmes and management training emerged at universities and other institutes, managers had less need to be taught how to run an organization. Management consultancies now teamed up with academics and famous business leaders to develop 'best practice' ideas that were then sold on to their clients, or used to develop reports outlining what their clients needed to do.

This second age of consultancy is what I term the preaching phase. It is characterised by approaches like Total Quality Management and Business Process Reengineering; strategy tools like Boston Consulting Group's BCG Matrix and McKinsey's Seven S Model; and popular books like *In Search of Excellence* and *The Art of Japanese Management*.

As we moved into the 21st century, managers, gaining in confidence, began to tire of being told from 'on high' how they should be and what they should do. They began to understand and appreciate that their organizations and the contexts in which they operated were unique, and that they understood these contexts better than the external consultants, particularly from the larger global practices who seemed to parachute in from afar. This led to a push back against a 'cookie cutter' approach whereby too many consultants sought to sell them generic blueprints for success.

From here a third phase, what I characterise as coaching, emerged. While it was recognised that it was managers themselves who must play the game/implement any strategy and so have some degree of ownership and involvement in the development of those strategies (or 'skin in the game' as some of my American friends would say), it was also understood that they could benefit from wise council and support from external consultants who had seen similar situations before and could impart advice and promote confidence among managers when needed.

The fourth age, and where I believe we are at today, sees the ideal role of the consultant as further de-elevated. Recent advertising by major consultancies have portrayed this approach as being like a golf caddy or a Sherpa. But I think the way these metaphors have been portrayed makes this role seem too passive or subservient. I prefer to see this as an age of partnering.

While some clients still need to learn technical skills from consultants, or find out about latest best-practices, or take on board some good coaching (and a good partner may have to be all of these things at times), these decisions about what is needed are much more client-led than consultant-led today – as they should be. However, a good management consultant, like any good partner with integrity, does not simply follow the client unquestioningly. He or she must be able to provide honest opinions based on their experience, be a critic and conscience when needed, step in when help and support is required and step away when it is not, ask the tough questions of management that employees may not be able or feel able to ask, display a willingness not to condone bad behaviour or take credit where it is not due: all with the aim of making the client as good an organization as it can be. These can be difficult tasks, but the rewards of seeing a good partner do well more than outweigh the hard work.

While being a good partner may be more challenging in many respects than being a teacher, a preacher or a coach in the way these have been described above, I believe the rewards are greater too. This is a great time to be or become a consultant and this guide is both an excellent starting point for this journey, as well as a refresher for those already embarked on a career in consultancy. I urge you to read it!

Stephen Cummings

Professor of Management, Victoria University Wellington & International Council of Management Consulting Institutes' Academic Fellow

PREFACE

IMC New Zealand's longstanding mission is to "promote excellence and ethics in management consulting through certification, education and the provision of professional resources" (Institute of Management Consultants New Zealand, 2016). While management consultancy in New Zealand continues to grow, with consultancy services this year falling within the government's All-of-Government procurement arrangements, the importance of existing and new management consultants being demonstrably credible has perhaps never been stronger.

This publication has its origin in work undertaken by Lilian Lawrence FIMCNZ on the development of a five level New Zealand-specific Consulting Skills Framework. The framework was developed under the auspices of an IMC New Zealand Training and Qualifications Taskforce which was formed to explore the feasibility of offering IMC New Zealand education programmes and qualifications, and to develop any qualifications framework. As members of this taskforce, further work was undertaken on this framework by Ron Stuart FIMCNZ, Rob Sewell CMC, Lilian Lawrence FIMCNZ and the author.

However, rather than further developing our own framework, in the light of the widespread global support for the International Council of Management Consulting Institutes' *Certified Management Consulting Competence Framework*, in 2015 IMC New Zealand formally adopted the new international framework. We also went on to engage nationally and internationally with key management consultancy professional development providers.

While this guide will be of interest to certified management consultants and purchasers of consultancy services, it is primarily for aspiring certified management consultants, whether they be existing experienced consultants, or those looking to enter the field.

Dr Iain Matheson CMC
Wellington
November, 2016

CONTENTS

FOREWORD	iv
PREFACE	vi
CONTENTS	vii
INTRODUCTION	1
PART 1: MANAGEMENT CONSULTING	2
What is Management Consulting?	2
Background	2
Definitions	2
Management Consulting Roles	3
Management Consulting in New Zealand	3
Background	3
Size of the New Zealand Management Consulting Market	4
Typology of Management Consultants in New Zealand	5
The Institute of Management Consultants (IMC) New Zealand	6
Requirements to Become a CMC in New Zealand	8
PART 2: INTERNATIONAL CMC COMPETENCE FRAMEWORK	9
Business Competence	10
A: Client Business Insight	10
B: Consulting Business Insight	10
Technical Competence	10
C: Functional Specialisation	10
D: Consulting Skills	11
Values and Behaviour Competence	14
E: Ethics and Professionalism	14
F: Analytical Skills	14
G: Personal Interaction	15
Personal Development	15
H: Continued Learning and Development	15
PART 3: MANAGEMENT CONSULTING COURSES, PROGRAMMES AND RESOURCES	16
IMC New Zealand's Management Consultant Competence Assessment Tool	16
IMC New Zealand Competences Related Courses and Programmes	17
Overseas Online/Distance Learning Management Consulting Courses	19
CMC-Canada Online Courses	19
Institute of Consulting Online/Distance Learning Courses	19
Other Management Consulting Courses	19

Business and Interpersonal Competences Related Education and Training	20
Project Management Competences related Education and Training Courses	20
Interpersonal Competences related Education and Training Courses	21
Resources and Support for Aspiring CMCs	22
IMC New Zealand Regional meetings	22
IMC New Zealand Information Sessions on CMC Certification	22
CMC Application ‘Buddies’	22
Formal Mentoring with a FIMCNZ/CMC	22
Intern Opportunities with IMC New Zealand Firms	22
Associate or Short Engagement Opportunities with a CMC (firm)	23
Employment Opportunities with Management Consulting Firms	23
IMC New Zealand Recommended Books and Articles	23
IMC New Zealand Recommended Management Consulting Websites, Blogs and Podcasts ..	23
CONCLUSION	24
REFERENCES	25
APPENDICES	26
1. Introduction to Consultancy Course	27
2. Essentials of Management Consulting Online Course	29
3. Essentials of Management Consulting Face-To-Face Course	31
4. Diploma of Consultancy Programme	33
5. Management Consulting Books and Articles	35
Management Consulting In New Zealand and Australia	35
The Management Consulting Profession	35
Management Consulting Marketing, Pricing & Sales	35
The Practice of Management Consulting	36
Establishing New And Growing Existing Management Consulting Firms	36
Purchasing Management Consultancy Services	36
Other Recommended Business Titles	37
6. Management Consulting Websites and Resources	38
Author websites	38
IMC New Zealand website and those of recommended sister ICMCI organisations	39
Other websites	40

INTRODUCTION

The international *Certified Management Consultants (CMC) Competence Framework* (International Council of Management Consulting Institutes, 2013), specifies the clusters of related abilities, commitments, knowledge and skills that a management consultant should demonstrate in practice, in order to successfully complete an assignment independently and unsupervised. The CMC designation indicates that a management consultant meets high international standards of competence, education, experience and ethical conduct. This publication, *The New Zealand Guide for Aspiring Certified Management Consultants*, has been developed for management consultants who are either:

- Existing IMC New Zealand Affiliate or Associate members who are working towards the CMC designation, or
- Prospective members who are considering gaining the CMC designation.



Part One of this guide discusses:

- Management consulting internationally
- Management consulting in New Zealand
- IMC New Zealand
- CMC requirements.

Part Two presents the international framework in full.

Part Three presents:

- Available professional development courses and programmes
- Other available forms of support for aspiring CMCs
- Recommended management consulting books and articles
- Recommended management consulting websites, blogs and podcasts.

This is a companion document to the current *Common Body of Knowledge* (IMC New Zealand, 2012), and the *Code of Professional Conduct* (IMC New Zealand, n.d.).

PART 1: MANAGEMENT CONSULTING

What is Management Consulting?

Background

While management consulting may be a young profession, worldwide the consulting sector is reputedly worth over 200 billion US dollars a year (Brooks & Edwards, 2014). Management consulting is usually regarded as having its roots in the United States' scientific management movement at the end of the 19th century, and in particular the work of F.W. Taylor and Arthur D. Little. This 'first wave' of management consulting was focused on 'shop floor' efficiency and productivity. Expansion in the United States was rapid with the establishment of Booz Allen Hamilton, and McKinsey in 1914 and 1926 respectively. With this expansion came a growing demand for advice on financial audit and control, and engineering issues. The congressional passage of the Glass-Steagail Banking Act in 1933 stimulated further expansion, and indeed effectively institutionalised the need for these and other management consultancy firms in the United States (with banks being required to separate out their investment and commercial functions, and subsequent demand for independent accounting audits). After WWII some of these firms expanded into Europe and Asia. This period also saw the emergence of so-called strategic consulting companies in the United States such as, for example, the Boston Consulting Group, and Bain & Company, as well as the emergence of the Big Eight auditing and accounting firms, and their provision of management consulting type services.

Through various mergers and acquisitions, the big eight international 'accountancy' firms have since become the Big Four (Deloitte, KPMG, PricewaterhouseCoopers (PWC) and Ernst & Young (EY)). The so-called international strategy firms (McKinsey & Co., The Boston Consulting Group and Bain & Co.) are also sometimes referred to as the Big Three. However, another important development internationally has also been the growth over recent years in management consulting sole practitioners and small management consulting firms.

Definitions

So, what is management consulting and the role of a management consultant? At its simplest, management consulting is the provision of independent advice and assistance to clients (whether in the public, private or not-for-profit sectors) with management responsibilities, challenges or opportunities. The International Labour Organization's (2002) definition, which is widely cited across the profession, is that management consulting "is an independent professional advisory service assisting managers and organisations to achieve organisational purposes and objectives by solving management and business problems, identifying and seizing new opportunities, enhancing learning and implementing changes" (p. 10).

Beyond that definition, CMC-Canada (2010) suggests there are five key aspects integral to professional management consulting practice:

- "An independent orientation; providing advice with objectivity and within the bounds of ethical behaviour
- Special training and qualifications resulting in expertise in specific management functions and issues, plus an overall breadth of knowledge across functional management areas
- Skilled in problem identification with the ability to apply diagnostic and analytical skills (and attendant tools and techniques)
- Skilled in problem-solution with the ability to apply creativity and analytic skills (and attendant tools and techniques)

- Ability to assist clients to successfully implement solutions” (p. 7).

Management Consulting Roles

The advice of management consultants can take several forms, as consultants can be either external or internal, and may take on one or more of a whole array of roles (Lambert, 1993), including being an outsourced function for the client organisation. Within a typical assignment, management consultants can play multiple roles such as:

- Generalist
- Specialist
- Process provider
- Content provider
- Diagnostician
- Implementer
- Coach/mentor
- Facilitator
- Change Manager/facilitator
- Programme manager.

It could be argued that management consulting is better conceptualised as an umbrella term for a range of related professions rather than as a stand-alone profession. However, there is a clear consensus across management consulting literature, that for them to be competent, credible and trustworthy, management consultants need to uphold the highest professional standards.

Management Consulting in New Zealand



As a young country accustomed to being at the furthest reaches of international trade, New Zealand has developed a unique and vibrant business culture. New Zealand's expertise in consultancy work has evolved from the country's background in research; innovation and reform...We now apply this expertise around the world (New Zealand Trade and Enterprise, 2015, p.1).

Background

While the history of management consulting in the United States can be clearly traced back to the end of the 19th century, in New Zealand, and to a lesser extent Australia, management consulting has a much more recent pedigree dating only from the 1970s and 80s. While the Institute of Management Consultants New Zealand was established as early as 1971 (Senior, 2004), the main impetus for this rise in demand for management consulting services within New Zealand can be attributed to the policies of the Lange (and in Australia the Hawkes) government, and the consequential opportunities that arose to help both government and commercial organisations adapt to the changes brought about by deregulation.

Prior to the Lange government there were only two large international management consulting firms in New Zealand: the UK company PA Consulting and WDS Scott which was headquartered in Australia, subsequently taken over by a predecessor of Deloitte, Touche, Tohmatsu (Senior, 2004). Subsequently New Zealand, in common with many other western countries at the time, saw the arrival

of the Big Eight international ‘accountancy’ firms, which have since become the Big Four. As for the so-called Big Three international strategy firms, they have never really been a feature of the New Zealand management consulting landscape, although some of these firms do have offices and personnel in Australia. However, demand for management consulting services in New Zealand has continued to grow. Perhaps the most significant change over recent years has been the proliferation of small New Zealand consulting firms and the number of sole practitioners.

Size of the New Zealand Management Consulting Market

While there are no current estimates on the size of the New Zealand management consulting market by either revenue or businesses, the Ministry of Business, Innovation and Employment (MBIE) (as cited in Careers New Zealand, 2015) has estimated there were 16,048 management consultants in New Zealand in 2014; this represents 10% growth on MBIE’s corresponding figures for 2012. While there will no doubt be definitional issues on what constitutes a management consultant, this nonetheless represents a substantial increase on the approximately 1,200 management consultants across the country that IMC New Zealand and the business magazine *New Zealand Management* extrapolated from their survey eight years earlier (Senior, 2004). In contrast, analysis of available data on management consulting revenue in, for example, Australia and Canada have found their markets to be worth \$8bn and \$9bn respectively, while management consulting employs 38,219 people across 11,770 businesses in Australia, and 51,110 people across 45,865 businesses in Canada (IBISWorld, 2015a, IBISWorld, 2015b).



The New Zealand government is a significant purchaser of management consulting services. Treasury figures from 2007 to 2009 show annual expenditure of about NZ\$150 - NZ\$180 million across all government departments and five Crown entities (Office of the Minister of State Services, 2010). In New Zealand the government's role in providing some infrastructure and services is greater than in some countries because of insufficient scale in the private sector, smaller capital markets and historic political support for government service provision. New Zealand governments do, however, hire in expertise to complement the advice of professional public servants.

While management consultants contribute to policy and strategy development, the government tends to use management consultants for strategic review and for strategy execution. There is a distinction between management consultants (who generally provide advice and fixed deliverables, often for a fixed fee) and professional contractors (who work for an hourly or daily rate providing specialist services. However, this NZ\$150 -NZ\$180 million figure is likely to be significantly understated.

The range of services provided is large and includes change management, strategic review, project and programme management, procurement, organisational design, etc. IMC New Zealand provides the opportunity for experienced management consultants to work with fellow CMCs collaboratively to provide advice to government agencies on larger projects.

Typology of Management Consultants in New Zealand

NZ management consulting sole practitioners and (part) owners of small firms

New Zealand research suggests that senior management buyers of management consulting services here may have different preferences to their counterparts in Australia (Page, 1998). While it was found that Australian buyers were more likely to view the general reputation of a consulting firm to be quite important, for New Zealanders knowing the actual individual consultant or consultants was considered more important. Another area of difference was cost; Australian buyers were less concerned about cost than those in New Zealand. However, buyers on both sides of the Tasman, and in contrast to the United States and Europe, preferred task specialists over process generalists, and New Zealand buyers most valued management consultants who could provide them with an outside perspective and a level of expertise that was not available in-house.

These findings may go some way to explain why, as found by Senior (2004), most management consultants in New Zealand, whether certified CMCs or not, are experienced sole practitioners or (part) owners of small firms. Indeed, it may be that managing consulting in New Zealand is more similar to that in Canada than Australia, where sole practitioners also dominate the marketplace (CMC-Canada, 2015).

CMCs who are sole practitioners and (part) owners of small firms are highly experienced and qualified (both academically and professionally). Many are former management consultants with one of the Big Four firms, or have a background in management, project management or business analysis. Most operate in a niche market and/or functional specialism, where they are recognised as experts in their field.

NZ or Australasian management consulting middle tier firms

While the majority of management consultants may be sole practitioners or (part) owners of small firms, there has also been a growth in middle tier firms or quasi middle tier firms (i.e. management consultants who essentially operate legally as sole practitioners but under the umbrella of a larger company). While a few middle tier firms operate nationwide, most are based in a specific city. Management consultants in middle tier firms tend to be highly experienced, and while they tend to be task and/or industry specialists, are well placed to collaborate with colleagues within the same firm on larger assignments. CMCs in middle tier firms tend to be highly experienced senior consultants and recognised as experts in their particular fields.

International management consulting firms

Despite the expansion of New Zealand firms and sole practitioners since the 1990s, the Big Four accountancy and audit firms in particular remain an important part of the management consulting scene in New Zealand, and provide advice on major projects and in specialist areas. All four currently have a management consulting presence in New Zealand alongside their other functions. Indeed many CMCs started their careers with such firms, in either New Zealand and/or overseas, and some such firms still offer good intern and career opportunities to graduates looking to enter the profession.

However, while the management consultants of many of the Big Four's management consultants overseas are CMC-certified (for example Ireland, the Netherlands and the United Kingdom), almost all in New Zealand have yet to become certified and so have never had the quality of their practice independently assessed and verified.

Specialist industry-specific management consultants

Many New Zealand management consultants can be found in very specific industries and disciplines such as agriculture, communications, economic development, emergency and disaster relief, energy and power services, engineering design, environmental management and conservation, fisheries and marine resources, forestry, health, legal, organisational and social support and development, resource management, seismic engineering, tourism and transportation, transportation asset management, urban planning and physical infrastructure and water supply and sanitation (New Zealand Trade and Enterprise, 2015).

Some of these individuals (and their firms) in New Zealand may identify more with their industry than the actual work that they do, and so may not identify as management consultants, business consultants, or even as consultants at all (Peirano-Vejo & Stablein, 2010). However, it is important that those with the appropriate knowledge, skills, values and behaviours also be recognised as part of the management consulting industry.

Internal consultancy roles

In part because of the work of Peter Block's book *Flawless Consulting*, there is a growing recognition that many people in staff or support roles within an organisation, whether it be, for example, in human resources, financial analysis, auditing, systems analysis, market research, product design, long-range planning, organisational effectiveness, safety or training and development, are performing the role of a consultant, whether they call themselves that or not (Block, 2011). It is also not uncommon to find CMCs in internal consultancy roles within an organisation.

The Institute of Management Consultants (IMC) New Zealand

IMC New Zealand was formed in 1971. It is the national professional body representing management consultants in New Zealand. IMC New Zealand was an early Trustee of the International Council of Management Consulting Institutes (ICMCI), an organisation that now spans 50 plus countries and has in excess of 25,000 members worldwide. IMC New Zealand adopted the CMC accreditation in 1988. The CMC designation indicates that a management consultant meets high international standards of competence, education, experience and ethical conduct. IMC New Zealand is subject to regular independent audit by the international body.



IMC New Zealand's (n.d.) mission is "to promote excellence and ethics in management consulting through **certification, education** and the provision of **professional resources**" (para. 10). It does this by:

- "Setting professional standards in New Zealand and developing the practice and profession of management consultancy
- Fostering the compliance of members with high standards of professional performance and ethical conduct
- Administering the global assessment and accreditation process for experienced management consultants - the (CMC)
- Publishing and updating the IMC New Zealand Common Body of Knowledge (CBK) of management consulting in New Zealand
- Promoting the training, education and qualifications of members and non-members, directly providing education and training opportunities, and accrediting external management consulting training providers
- Providing mentoring, support and information for new and prospective entrants to the profession
- Overseeing a code of professional ethics, and administering an independent complaints process
- Promoting the use of proven management consulting tools and methodologies, and the use of research evidence in management consulting assignments
- Providing organisations (i.e. prospective employers of consulting services) with a register of members, and guidance on selecting an appropriately qualified and experienced professional adviser
- Representing firms and sole practitioners, and giving a voice to the management consulting profession in New Zealand" (IMC New Zealand, n.d., para. 12).

IMC New Zealand provides a range of membership classes for individuals (Affiliate, Associate, Member/CMC, and Fellow). As well as having several prestigious organisations as Corporate Affiliate members, IMC New Zealand also has an internationally audited Accredited Consulting Practice scheme for selective member firms that have been evaluated by IMC New Zealand as having systems and training at a suitably high standard, and can therefore recommend employees for certification.

With a salaried National Secretary in Auckland, IMC New Zealand has regular regional meetings in both Auckland and Wellington. The national council meets by telephone or face-to-face monthly, and face-to-face twice a year for strategy days and has a cohort of Fellows that the council can turn to for advice. IMC New Zealand also has a comprehensive website (<http://www.imcnz.org>), a regular newsletter for members, and LinkedIn groups (one of which is specifically for CMC members only).

As well as a close and successful collaborative partnership with the Victoria University of Wellington's Business School and MBA programme, IMC New Zealand also has relationships with the University Of Waikato School Of Business, the Massey University-based Business Performance Improvement Resource (BPIR) and the NZ Business Excellence Foundation. IMC New Zealand also works internationally with a number of other ICMCI member countries.

Requirements to Become a CMC in New Zealand



In New Zealand, unlike in some countries such as Canada and Austria where professional accreditation is compulsory, the title 'management consultant' is not protected by legislation. Here, anyone can actually call themselves a management consultant. However, a CMC is a management consultant who views management consulting as a profession and meets high external standards in relation to character, qualifications, experience, independence, competence and ethical behaviour, as follows:

- **Experience:** Three years in management consulting
- **Education:** Recognised degree or professional qualification or additional five years in management consulting in lieu of a degree
- **Time spent:** Able to demonstrate that in the last three years, management consulting has been a significant part of their activity. This can include consulting with clients; selling, managing and/or supporting consulting activity; preparing for and teaching consultancy; publishing and writing on consultancy
- **Independence:** Owner or employee of a firm in independent practice, or internal consultant in organisation, meeting the Institute's independence criteria.

The associated qualification process for CMC status is:

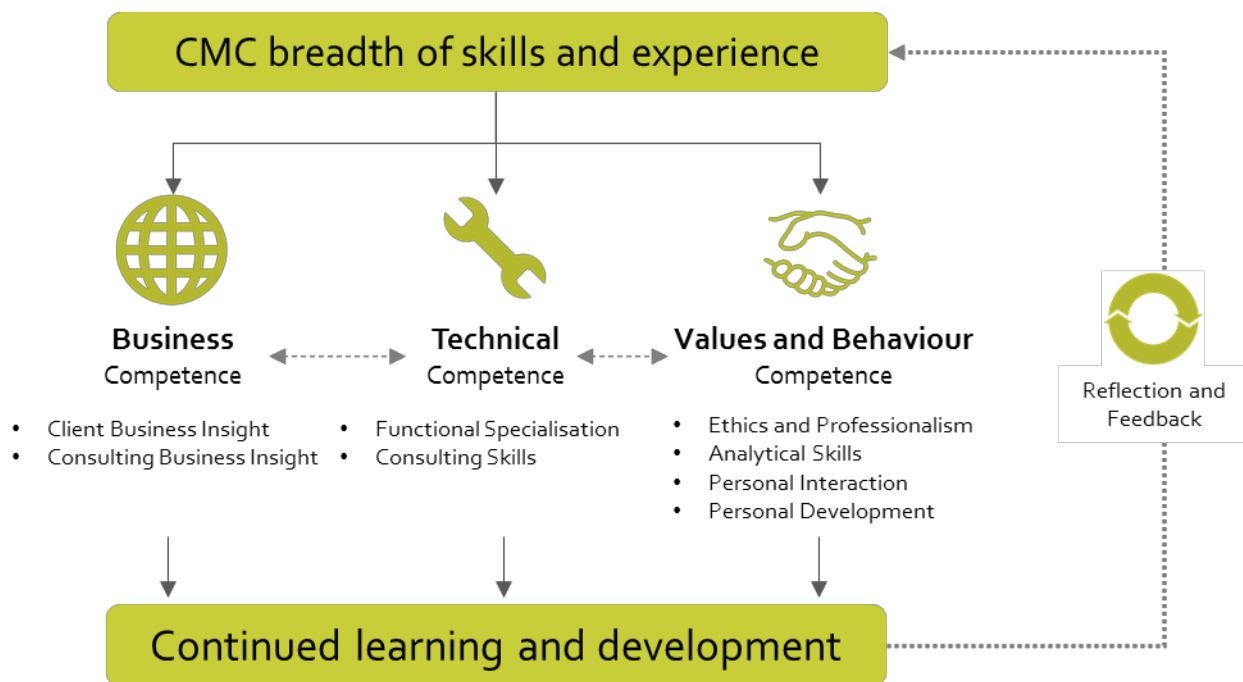
- **Experience:** Minimum of three years' experience as a practicing management consultant
- **Examination:** Structured interview to test knowledge of the code of professional conduct and common body of knowledge
- **References:** Written descriptions of three consulting engagements and three client references verified through interview.

Each CMC also pledges in writing to abide by their Institute's code of professional conduct. Their adherence to this code signifies voluntary assumption of self-discipline above and beyond the requirements of law. Every Institute member of ICMCI has such a code which meets the minimum standards of ICMCI. Institutes enforce their code by receiving and investigating complaints of violations and by taking disciplinary action, including revocation of certification, against any member who is found guilty of code violation.

PART 2: INTERNATIONAL CMC COMPETENCE FRAMEWORK

The International Council of Management Consulting Institute (2014) CMC Competence Framework specifies the clusters of related abilities, commitments, knowledge, and skills that a management consultant should demonstrate in practice in order to successfully complete an assignment independently and unsupervised.

Figure 1: Overview of International Council of Management Consulting Institutes' CMC Competence Framework



Business Competence

A: Client Business Insight

Understands the internal and external factors impacting on the project		
A1	Client understanding	Researches and understands the client business, the sector in which it operates, and its stakeholders (A1.1).
A2	Client business knowledge	Analyses business culture, structure, processes, management and performance criteria based on scope of work, and at an appropriate level to be able to complete the assignment (A2.2).
A3	External awareness	Formulates analysis for client, including the current political, economic, social, technological, legal and environmental factors which may impact the assignment (A3.1).

B: Consulting Business Insight

Understands the management consultancy environment and its commercial aspects		
B1	Consultancy business knowledge	Understands the nature of the management consultancy market, competitors and capabilities (B1.1).
B2	Commercial aspects of assignments	Demonstrates understanding of commercial aspects of projects, including scoping, pricing, risk, and terms and conditions (B2.1).
		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 (B2.2).

Technical Competence

C: Functional Specialisation

Recognised as an expert in own discipline		
C1	Functional knowledge and skills	Shows evidence of at least one year's management consulting experience in the declared primary functional specialism PLUS: <ul style="list-style-type: none"> A degree or professional qualification in the functional specialism, OR At least four years' specialised work experience in the functional specialism (C1.1).
C2	Sectorial knowledge and experience	Demonstrates how functional expertise has been applied in at least one business sector (C2.1).

D: Consulting Skills

D1: Client Focus

Determines the scope of client assignments. Manages client and other stakeholders' expectations. Engages expertise of others where appropriate.		
D.1.1	Scoping client requirements	Understands and defines client requirements as evidenced by client agreement (D1.1.1).
		Where appropriate, presents clear comprehensive written proposals (D1.1.2).
		Engages the client in selecting, and taking ownership of, options for the structure and execution of the assignment (D1.1.3).
D1.2	Managing client interface	<p>Manages client, and consultancy stakeholder expectations:-</p> <p>Complies with contractual terms</p> <p>Conducts regular assignment reviews with client</p> <p>Obtains client agreement if the scope of work changes (D1.2.1).</p>
D1.3	Partnering and networking	Understands and engages expertise of others alongside own (D1.3.1).
		Leverages network effectively to research and define client issues, generate innovative solutions for clients and/or inform the delivery solution (D1.3.2).

D2: Assignment Management

Manages client assignments effectively; delivers timely solutions while balancing priorities and managing time effectively		
D2.1	Managing successful outcomes	Manages client assignments successfully, ensuring that objectives, deadlines and budgets are agreed and delivered on time (D2.1.1).
D2.2	Planning	Demonstrates competent use of planning tools and techniques, and sets milestones appropriate for the size and scale of the assignment (D2.2.1).
D2.3	Managing the assignment	Shows flexibility and adaptability to changing demands and deadlines. Demonstrates ability to manage ambiguity (D2.3.1).
		Keeps 'big picture' in focus but addresses detail and balances priorities (D2.3.2).
		Manages own time effectively to meet deadlines (D2.3.3).
		Where appropriate, demonstrates the ability to identify, develop, describe and allocate work streams for others to meet objectives, deadlines and budgets (D2.3.4).
D2.4	Working on all phases of project	Operates competently in all areas of project delivery from offering through to closure (D2.4.1).

D3: Consulting Knowledge

Captures, shares and applies knowledge in a structured way relevant to the engagement needs		
D3.1	Using a logical process approach to capturing and building knowledge	Gathers records and analyses data and information through ordered and logical processes and translates data into useable output (D3.1.1).
D3.2	Sharing knowledge and experiences with others	Shares acquired knowledge and experience with others in appropriate ways in order to build value for the client (D3.2.1).
D3.3	Applying knowledge, tools and technical expertise to create value for the client	Demonstrates how value was created for the client through use of knowledge, tools and expertise and shows how this was tailored to meet the client's needs (D3.3.1).

D4: Consulting Process Techniques

Uses a range of techniques, including facilitation, coaching and mentoring to deliver solutions of mutual benefit		
D4.1	Presentation	Uses presentation tools and techniques effectively (D4.1.1).
D4.2	Written reports	Produces clear client correspondence and reports selecting most appropriate style to achieve desired outcome (D4.2.1).
D4.3	Facilitation	Manages group processes to achieve desired outcomes, using facilitation tools and techniques to maximise the group's decision making potential (D4.3.1).
D4.4	Coaching	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 (D.4.4.1).
D4.5	Mentoring	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 (D4.5.1).
D4.6	Consensus building	Demonstrates skills in building consensus and managing conflict (D4.6.1).
D4.7	Collaborative working	Works effectively in a team with others and seeks support from others if appropriate (D4.7.1).
		Demonstrates, if in a management role, the management, development and appraisal of others and delegation of tasks (D4.7.2).

D5: Tools and Methodologies

Selects and uses appropriate tools and methodologies		
D5.1	Selects and uses appropriate diagnostic tools, methods and techniques	Evaluates tools and techniques against validity criteria and uses them to obtain best data, information or knowledge available, within budgetary or organisational constraints (D5.1.1).
		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 (D5.1.2).

D6: Risk and Quality Management

Defines risk criteria, identifying, mitigating and managing risks and outcomes. Defines quality standards, ensuring quality of delivery and client satisfaction		
D6.1	Managing risk and issues	Analyses 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) (D6.1.1).
		Where appropriate, applies risk management processes, including planning and resourcing, monitoring and reporting. Where appropriate, uses risk and/or issue logs, reports, risk mitigation and/or recovery action, and the use and control of contingencies. Demonstrates suitable responses to issues that arise during an assignment (D6.1.2).
D6.2	Managing quality	Identifies success criteria to ensure required quality of deliverables is achieved (D6.2.1).
		Assures quality compliance of own deliverables and, where appropriate, those of the consultancy team (D6.2.2).
		Monitors and measures client satisfaction (D6.2.3).

Values and Behaviour Competence

E: 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.		
E1	Demonstrating ethical behaviour	Demonstrates appropriate ethical behaviour and adheres to the ICMCI and/or National Institute Code of Professional Conduct and Ethics (E1.1).
E2	Demonstrating professional behaviour	Ensures professional advice is sound and relevant to client's needs (E2.1).
E2		Sets high personal standards, acts with integrity, respects confidentiality, and is courteous, reliable and responsive in dealing with others (E2.2).
E3		Understands and manages diversity in terms of culture, religion, race and gender (E2.3).
E4		Demonstrates behaviour that earns the respect of professional colleagues (E2.4).
E5		Applies professional and ethical criteria and withdraws from an engagement that discovers, or causes, illegal activity (E2.5).

F: Analytical Skills

Applies analytical and pro-active thinking to ensure robust and appropriate client solutions		
F1	Problem solving	Uses a logical, coherent and consistent approach to problem-solving. Challenges assumptions and probes detail (F1.1).
F2	Decision making and recommendation	Understands the implications of different courses of action. Makes recommendations based on risk analysis with facts and assesses the ability of the client to implement (F2.1).
F3	Innovation	Demonstrates flexibility, creativity and innovation in generating solutions and recommendations (F3.1).

G: Personal Interaction

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 skills. Demonstrates communication skills.

G1	Taking responsibility for own actions	Maintains responsibility to the client to remain within the scope of work. Identifies and, where appropriate, notifies colleagues of issues outside scope of work (G1.1).
G2	Handles complexity	Works effectively in complex environments containing value-conflicts and uncertainties, needing, at most, only indirect supervision (G2.1).
G3	Interacts effectively with others	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 (G3.1).
G4	Demonstrates influencing skills	Presents ideas convincingly to the client to achieve specific outcomes (G4.1).
G5	Demonstrates communication skills	Conveys information in a clear focused style using effective verbal, non-verbal, graphical, written and oral communication techniques in formal and informal situations (G5.1).

Personal Development

H: Continued Learning and Development

Plans self-development and shows track record of personal growth

H1	Self-development	Identifies opportunities and sets personal objectives for a tailored Continuing Professional Development Programme (H1.1).
		Pro-actively seeks opportunities to further own development. Seeks and acts on feedback from clients, superiors, peers and team members to personal development. Learns from own and others' past assignments (H1.2).
		Demonstrates a logical process to seek out new tools and techniques, and identify their relevance to current and future work (H1.3).

PART 3: MANAGEMENT CONSULTING COURSES, PROGRAMMES AND RESOURCES

What marks the ICMCI CMC Competence Framework out from other more generic models is that many of the competences specifically relate to management consulting, and require the demonstration of particular clusters of knowledge, skills and behaviours in relation to:

- Consulting business insight
- Consulting skills
- Ethics and professionalisms.

Some aspiring CMCs, through their experience in another or their own management consulting firm, and supplemented by the IMC New Zealand *Common Body of Knowledge* and IMC New Zealand *Code of Professional Conduct* and wider reading, may already be able to demonstrate the necessary management consulting competences. Such experience may have included having a clear professional development plan, comprehensive on-the-job training and/or long-term mentoring. However, most aspiring CMCs, including those above, would benefit from taking a specialist management consulting professional development course or programme to help them develop or refine their management consulting competences. For those who meet the three years of management consulting experience threshold, a course or programme would assist in the development of their case studies and preparation for the CMC interview. While professional development courses and programmes are not a mandatory requirement for the CMC designation process, IMC New Zealand recommends aspiring CMCs critically assess their management consulting competences, and if necessary seek to address any gaps with training (or mentoring, reading, on-the-job training, etc.). Such courses are of course also valuable for those first entering the management consulting profession, whether as a young graduate, a seasoned professional making the transition from a functional discipline, a corporate, government or NGO manager, or an entrepreneur.

IMC New Zealand's Management Consultant Competence Assessment Tool

Based upon the International Council of Management Consulting Institutes' CMC Competence Framework, *AssessMyConsulting.com* is a New Zealand-developed application that enables consultants to measure themselves against the international framework. The online tool allows the user to assess their levels of business competence, technical competence, consulting skills, values and behaviour competence, and commitment to professional development, as well as identify opportunities for development. The standard assessment is free and anonymous. *AssessMyConsulting.com* is a brand of Consulting Skills Framework Ltd, an IMC New Zealand owned company.

AssessMyConsulting.com is designed to:

- Identify consultancy strengths and weaknesses
- Assist in building consulting competence
- Support professional development
- Broaden consultant opportunities in the consulting marketplace
- Create a competitive advantage over others who may rely on static experience.

Using *AssessMyConsulting.com* is an ideal strategy and personal development tool for those aspiring to enter the consulting industry, existing CMCs, other consultants, and MBA graduates. A more detailed premium assessment is also available for a fee, with a link sent to you by email.

IMC New Zealand Competences Related Courses and Programmes

In Spring 2016 IMC New Zealand launched its first consulting development programme, with the development of another three offerings nearing completion. All four programmes will be open to IMC New Zealand members and non-members alike. One is for prospective, new and recent internal and external consultants while the other three are broadly aimed at more experienced consultants, aspiring CMCs, and those who have recently gained their CMC accreditation.

Table 1: IMC New Zealand Courses for Internal and External Consultants

	New Practitioner	Early Practitioner	Practitioner	Advanced Practitioner	Master Practitioner
Introduction to Consultancy	✓	✓			
Online Essentials of Management Consulting	✓	✓	✓		
Essentials of Management Consulting		✓	✓	✓	
Diploma in Consulting				✓	✓

These programmes will, as well as developing appropriate knowledge, skills and values, help aspiring CMCs to prepare for their CMC application and interview. One of the programmes uses online/blended learning methods, two are face-to-face group-based training courses, and the other is an individualised mentored development and assessment programme. These programmes are summarised on the next pages; for more detailed information, refer to the appendices.



Name	Introduction to Consultancy	Online Essentials of Management Consulting	Essentials of Management Consulting	Diploma in Consulting
Facilitators	Select Certified Management Consultants approved by IMC NZ Council	Kevin Schwenker FCMC (Canada)	Kevin Schwenker FCMC (Canada)	Tony Simmonds CMC (mentor/assessor) (Australia)
Organisation	IMC NZ	Schwenker & Associates	Schwenker & Associates	Interlink Technology Pty Ltd
Length	1 day	3 months (incl. recorded lectures, 6 live facilitator led sessions, and 10 virtual team sessions)	3 days plus half-day advance study course	Highly flexible – up to several months as agreed
Target	Prospective, new and recent internal/external consultants	New ¹ , recent and experienced internal/external consultants	Recent ¹ and experienced internal/external consultants	Very experienced internal/external consultants
Requirements	N/A	MS Office, internet access, and computer headset/microphone	N/A	5+ years consultancy experience
Location	Auckland, Wellington, and other centres as required	Online: Cisco WebEx Business Suite 27	Auckland and/or Wellington	Workplace-based – Skype/email
Delivery mode	Interactive classroom-based	Interactive blended learning incl. team-based case study	Interactive classroom-based	1:1 Skype and email
Group size	Maximum of 12 people	5-7 people	Maximum of 20 people	N/A
Course availability	As numbers and schedule permits	As numbers and schedule permits	Annual or biennial	Continuously available
Assessment	N/A	Meeting course requirements, and 70%+ in final test	Meeting course requirements, and 70%+ in final test	Workplace observation, testimonials & documentation
Accreditation	IMC NZ	IMC NZ	IMC NZ	Aus. Skills Quality Authority vocational qualification
Any other endorsement	N/A	CMC-Canada Learning Program	CMC-Canada Learning Program	IMC NZ and ITPL
Certificate	IMC NZ Course Completion	IMC NZ Course Completion	IMC NZ Course Completion	IMC NZ and ITPL qualification
Fees	To be announced	To be announced	To be announced	IMC NZ members ² : A\$4,200 ³ Non-members: A\$4,800 ²

¹ Those new to the consulting profession might consider taking the online version of *Essentials of Management Consulting* over the face-to-face one, as additional time is spent preparing full consulting report deliverables for each stage in the consulting process based on the case study.

² Reduced fee applies to all IMC NZ members and not just to those with the MIMCNZ/CMC designation, i.e. includes Associate, Affiliate, Accredited Consulting Practice, and Corporate Affiliate, members.

³ All fees correct at November 2016. No NZ GST to payable for programmes offered by overseas training organisations. However, PayPal or Bank Foreign Exchange International Transfer fees may be applicable.

Overseas Online/Distance Learning Management Consulting Courses

Overseas online and/or distance learning courses may also be of interest to New Zealand management consultants. These examples are offered by, or on behalf of, CMC-Canada and the UK's Institute of Consulting. While courses are not individually endorsed by IMC New Zealand per se, both of these organisations have a long history of delivering high quality professional development courses for management consultants. Courses listed here are online or distance learning only, although time zone differences may make many delivered in 'real time' impractical.

CMC-Canada Online Courses

CMC-Canada is IMC New Zealand's sister body in Canada. Every few weeks they offer the following two online courses:

- **CMC-Canada Essentials of Management Consulting online** (this is similar to the IMC New Zealand course previously referred to)
- **CMC-Canada Ethical behaviour:** best practices of management consultants online.

Depending upon individual course timings (they vary), applicable Canadian time zones, and the time of year, a (limited) number of these courses may work for participants in New Zealand. Face-to-face versions of both of these are also available in most Canadian provinces. More information on CMC-Canada's courses can be found at

<http://www.cmc-canada.ca/professionaldevelopment/events/coursescalendar>

Institute of Consulting Online/Distance Learning Courses

The Institute of Consulting (IC), part of the Chartered Management Institute (CMI), is IMC New Zealand's sister body in the United Kingdom. They have approximately 50 approved training centres (including several universities), and some of these offer one or more of the following six professional consultancy qualifications on an online and/or distance learning basis:

- CMI Level 5 Award in Professional Consulting
- CMI Level 5 Certificate in Professional Consulting
- CMI Level 5 Diploma in Professional Consulting
- CMI Level 7 Award in Professional Consulting
- CMI Level 7 Certificate in Professional Consulting
- CMI Level 7 Diploma in Professional Consulting.

As well as being accredited by the UK's Chartered Management Institute, all these courses are also recognised as professional qualifications by the United Kingdoms' equivalents of the New Zealand Qualifications Authority and appear on the Qualification Credit Framework (QCF), the Scottish Qualification Credit Framework (SQCF), and the European Qualifications Framework (EFQ). The IC's professional development course material can be found at

http://www.iconsulting.org.uk/training_and_qualifications.

Other Management Consulting Courses

IMC New Zealand occasionally advertises other appropriate learning courses and programmes on its website and/or through its newsletter and LinkedIn groups. Please note that IMC New Zealand only endorses or recommends courses that are delivered by organisations and management consulting facilitators who demonstrably have the professional competence, knowledge and skill to do so. In most instances, only courses that are led by a CMC accredited management consulting facilitator will be endorsed, recommended or publicised by IMC New Zealand.

Business and Interpersonal Competences Related Education and Training

As well as management consulting competences (and those relating to any functional specialty), the ICMCI CMC Competence Framework and CMC designation, also require the demonstration of a range of other business and interpersonal competences, including clusters of knowledge, skills and behaviours in relation to:

- Client business insight
- Analytical skills
- Person interaction
- Personal development.

The extent to which an aspiring CMC can already possess and demonstrate these competences will vary depending upon such factors as education, careers history and experience, pathway to becoming a management consultant, and aptitudes. For example, for some of our aspiring CMCs, their route into the profession is through completion of an MBA or business programme undertaken with a New Zealand university. Depending upon their business experience, they may already be able to demonstrate all of the ICMCI CMC business competences. Similarly, others who have taken a different route to becoming a management consultant may already possess all of the ICMCI CMC interpersonal competences.

While education or training courses are not a mandatory requirement for the CMC designation, aspiring CMCs are required to critically assess their business and interpersonal competences, in addition to those relating to management consulting. If necessary they are required to take steps to address any competence gaps, whether through training courses, mentoring, reading, reflection and/or on-the-job training etc. It should be noted that across all of the ICMCI CMC competences that do not relate specifically to management consulting, project management and interpersonal competences feature prominently.

Project Management Competences related Education and Training Courses

Project management is an important aspect of many management consulting assignments, and there are also some important links with programme management and strategy. Aspiring CMCs are expected to have developed, and be able to demonstrate, project management knowledge, skill and competence. Project management education and training is available from numerous providers including the following:

New Zealand Universities

Most New Zealand universities offer courses in both generic and specialist project management, and some are available on an online/distance learning basis. Universities are likely to be more academically and theoretically orientated than professional and practical. These can take the form of:

- Short courses in project management (usually of one to three days duration)
- Individual undergraduate project management papers
- Individual postgraduate project management papers
- Postgraduate project management qualifications at certificate, diploma or master's level.

Project Management Institute (PMI)

Many CMCs have PMI certification (and some are also members of PMI). PMI mainly offers the following two examination-preparation programmes:

- PMP (Project Management Professional)
- CAPM (Certified Associate in Project Management).

‘Certification Preparation Networks’ groups, held across a number of centres and facilitated by a local volunteer, assist individuals prepare for the PMI exams.

Private Training Providers

Many private training and other organisations in New Zealand and overseas, provide project management training. These range from short courses (usually of one to three days' duration) to professional qualifications. Some private training organisations are accredited to deliver the PRINCE2 methodology and the following two qualifications (which in some respects could be said to parallel the two PMI programmes above):

- PRINCE2 Practitioner Certification
- PRINCE2 Foundation Certification (also available as an e-learning course).

A range of other e-learning courses are also available.

Interpersonal Competences related Education and Training Courses

While the options for interpersonal competences related education and training courses are too numerous to list here, it is worth highlighting that IMC New Zealand has recently become part of the short public courses Affiliate Programme of CDL Insights Consulting (CDL). CDL offer short courses in these areas:

- Leadership
- People (and Project) Management
- Interpersonal
- Communication
- Negotiation
- Customer Service
- Sales Skills.



CDL has training rooms in Auckland, Wellington and Christchurch, and also offers some courses across 13 other regional locations. As a membership benefit, IMC New Zealand members receive a 20% discount on all CDL public course standard prices (IMC New Zealand is a CDL Affiliate Organisation). For more information see the CDL website at <http://cdlinsight.co.nz>. To obtain the fee discount, current IMC New Zealand members must enter the code IMCNZ on the booking form.

Resources and Support for Aspiring CMCs

IMC New Zealand Regional meetings

Regional meetings are regularly held in Auckland and Wellington. Attending these is a great way for new IMC New Zealand members and aspiring CMCs to learn about management consulting in New Zealand, and to meet others working in the field. We are happy for non-members to come along to a meeting or two before deciding whether to join the organisation. For non-members, the best way to learn about our regional events is to check the IMC New Zealand website at www.imcnz.org, or to join our LinkedIn group at <https://www.linkedin.com/groups/2958576/>. Let our Secretary know that you would like to come along to an event so that we can look out for you and say hello!

IMC New Zealand Information Sessions on CMC Certification

One-to-one information sessions (for members and non-members) with a council member or Fellow, on CMC certification requirements, are regularly held in Auckland and Wellington as needed. If there is sufficient demand sessions may be organised for small groups. For those outside Auckland and Wellington, we may still be able to arrange to do a session in your area, or alternatively do so by telephone/skype. Please let the National Secretary know at info@imcnz.org if you are interested.

CMC Application 'Buddies'

While they are all busy people, most CMCs are only too happy to find some time to help a new affiliate or associate member with their CMC application. If you are attending an IMC New Zealand regional event and get to talk with some CMCs, you can always approach someone yourself. Alternatively, ask a member of the council or email the National Secretary at info@imcnz.org, and we'll try and put you in touch with someone who can support you.

Formal Mentoring with a FIMCNZ/CMC

Some of the Institute's Fellows and more experienced CMCs provide mentoring services to CMCs and aspiring CMCs, as part of their management consulting practices. Mentoring can be short-term and a means of preparing for the CMC application process, or as a longer term professional development programme. Fees vary (and in some instances discounts may apply to aspiring CMCs). While not formally accredited by IMC New Zealand, a list of Fellows and CMCs who offer mentoring services is maintained by the Institute, and this can be obtained by contacting the National Secretary at info@imcnz.org.

Intern Opportunities with IMC New Zealand Firms

CMCs, both sole practitioners and those in firms, sometimes have opportunities for an intern; this can provide aspiring CMCs with opportunities to be part of a larger, or different type of, management consulting assignment than might otherwise be the case, and thus gain valuable new knowledge, skills and experience. Internships may be full-time, part-time or project-specific. They may or may not be paid. While the offering of internships is not accredited by the Institute, intern opportunities may be placed by CMCs on-the-job tabs of our LinkedIn groups. Some non-IMC New Zealand member firms may also have intern opportunities.

Associate or Short Engagement Opportunities with a CMC (firm)

Do you have expertise in a specific area that a CMC member or their firm might be able to use on one of their assignments? As an alternative to the intern option above, there may be opportunities to gain new knowledge and skills through being engaged on a specific project by a CMC as an associate.

Employment Opportunities with Management Consulting Firms

Many New Zealand CMCs started their careers in one of the Big Four: Deloitte, KPMG, Price Waterhouse Cooper (PWC) and Ernst & Young (EY); they have offices in most major New Zealand cities. These firms, and some others, may sometimes offer managing consulting graduate entry opportunities.

IMC New Zealand Recommended Books and Articles

IMC New Zealand recommended managing consulting books and articles are provided in Appendix 5 and cover the following topics:

- Management consulting in New Zealand and Australia
- The management consulting profession
- The practice of management consulting
- Management consulting marketing, pricing and sales
- Establishing new and growing existing management consulting firms
- Purchasing management consultancy services
- Other recommended business titles.

IMC New Zealand Recommended Management Consulting Websites, Blogs and Podcasts

IMC New Zealand recommended management consulting websites, blogs and podcasts are provided in Appendix 6, and cover the following topics:

- Author websites
- IMC New Zealand and recommended websites of sister (International Council of Management Consulting Institutes) organisations
- Other websites.

CONCLUSION

Whether you are an experienced consultant looking to become a CMC in order to validate your existing knowledge, skills, ethical standards and experience, or someone at the start or middle of their career preparing to enter the field, we at IMC New Zealand hope that you have found, and will continue to find, the material in this guide useful. We also hope that you take up the opportunities on offer here, in order to strengthen your management consultancy practice and its effectiveness, demonstrate your professional credibility, and show your commitment to continuing professional development.



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APPENDICES

1. Introduction to Consultancy Course.....	27
2. Essentials of Management Consulting Online Course.....	29
3. Essentials of Management Consulting Face-To-Face Course	31
4. Diploma of Consultancy Programme.....	33
5. Management Consulting Books and Articles.....	35
6. Management Consulting Websites and Resources	38

1. Introduction to Consultancy Course

Introduction

Have you recently made, or are you considering, a move into management consultancy? The Institute of Management Consultants New Zealand's (IMC New Zealand) *Introduction to Consultancy* course has been designed and developed as a one-day programme for professionals who are prospective, new, or recent internal and external consultants, or those considering entering the profession. It is also suitable for line managers, purchasers of consultancy services, and specialists seeking an overview of consultancy.

Overview

This one-day course is an introduction to management consultancy and the management consulting profession. The course is delivered by Select Certified Management Consultants approved by IMC New Zealand Council; all have considerable experience in management consulting.

Content

Our Introduction of Consultancy covers these areas:

- **The New Zealand context:** Management consulting in New Zealand, Australia and internationally.
- **Mastery:** What knowledge, skills and experience do you have to offer and/or are looking to develop?
- **Core competences:** International management consulting competences from the International Council of Management Consulting Institutes.
- **The consulting process:** Introduction to the consulting process, cycle, methodologies and tools.
- **Marketing and business:** Promoting you and your business or service.
- **Ethics:** Ethical considerations that all management consultants need to be aware of.
- **Entering the management consulting field:** Becoming established, qualified and credible.

Course fee includes a follow-up face-to-face or telephone meeting with one of the facilitators to discuss your implementation or progressing with any particular aspect of the course, or related area.

Further details

Facilitator	Select Certified Management Consultants approved by IMC New Zealand Council
Delivery organisation	IMC New Zealand
Length	1 day
Target	Prospective, new and recent internal/external consultants
Requirements	N/A
Location	Auckland, Wellington, Christchurch, and other centres as required
Delivery mode	Interactive classroom-based
Group size	Maximum of 12 people
Course availability	As numbers and schedule permits
Assessment	N/A
Accreditation	IMC New Zealand
Other endorsement	N/A
Certification	IMC New Zealand Course Completion Certificate
Fees	To be announced Note: Reduced fee applies to all IMC New Zealand members and not just those with the MIMCNZ/CMC designation i.e. includes associate, affiliate, Accredited Consulting Practice, and Corporate Affiliate members
Alternatives	In-house Introduction to Consultancy version available, or 1:1 face-to-face/Skype coaching for consultants, managers or commissioners
Enrolments/information	Iain Matheson (IMC New Zealand Council) iain@mathesonassociates.co.nz
Information correct at	November 2016

2. Essentials of Management Consulting Online Course

Introduction

Are you a practicing management consultant pursuing the Certified Management Consultant (CMC) designation? Are you a CMC looking to update your existing knowledge and skills and deliver superior value to your clients? Or are you considering consulting as a career move? Taught by one of Canada's leading management consultants and trainers, this intensive programme will teach you a quality repeatable process, and enable you to develop the skills, methodologies and tools that you need. As well as this online *Essentials of Management Consulting* course, a face-to-face version is also available (see Appendix 3); those new to the consulting profession may wish to consider taking this online version, as additional time is spent preparing full consulting report deliverables for each stage in the consulting process based on the case study. While this is a CMC-Canada course and is delivered by a CMC-Canada national trainer, each course is for New Zealand participants only.

Overview

With six two-hour interactive instructor-team meetings, and three months of weekly team meetings, this course covers tools and techniques used by professional management consultants in undertaking client interventions, plus core additional skills around client communications, change management and teamwork. This programme covers most core elements of the *Certified Management Consultant (CMC) Competence Framework 2013* (International Council of Management Consulting Institutes 2014), a large portion of the core knowledge identified in the text, *Management Consulting: An Introduction to the Methodologies, Tools and Techniques of the Profession* Australian and New Zealand edition (IMC Australia, 2012), and ethics.

Content

1. **Winning and initiating the assignment:** Covers how successful consultants win and begin assignments. Experience shows the first steps can make or break client engagement.
2. **Diagnosing the problem:** How to diagnose the problem(s) and build a foundation for client commitment to act on your findings.
3. **Action planning and implementation:** How to develop solutions for your client's problems and win client approval to implement your recommendations.
4. **The importance of effective project transition and termination:** Learn the key activities to close an assignment and win future follow-up business.
5. **The client consultant relationship:** Great consulting is collaboration between consultant and client; making that work requires strong interpersonal skills and a professional process that can be learned and managed through the consulting process and interactive case study simulation used in this programme.
6. **How to manage change and your client's capabilities:** This is an inherent part of management consulting. Consultants always introduce change as part of their consulting assignments. How you assess, nurture and build client capabilities will be the determinant of your success or failure.

Recommended texts

While not essential, *Management Consulting: An Introduction to the Methodologies, Tools and Techniques of the Profession* Australian and New Zealand edition (available from IMC Australia), and the 2007 *Essentials of Management Consulting Course Reader* (available from CMC-Canada), are both recommended texts for this programme.

Further details

Facilitator	Kevin Schwenker FCMC (Canada)
Delivery organisation	Schwenker & Associates
Length	3 months (including recorded lectures, 6 live facilitator led sessions, and 10 virtual team sessions)
Target	New ⁴ , recent, and experienced internal/external consultants
Requirements	Microsoft Office, internet access, and computer headset with microphone
Location	Online: Cisco WebEx Business Suite 27
Delivery mode	Interactive blended learning incl. team-based learning and case study
Group size	5-7 participants
Course availability	As numbers and schedule permits
Assessment	Satisfactory completion of course requirements, and 70%+ achievement in individual final test
Accreditation	IMC New Zealand and CMC-Canada
Any other endorsement	N/A
Certification	IMC New Zealand
Fees	To be announced Note: Reduced fee applies to all IMC New Zealand members and not just to those with the MIMCNZ/CMC designation i.e. includes associate, affiliate, accredited consulting practice, and Corporate Affiliate members
Alternative delivery modes	N/A
Enrolments and further information	Iain Matheson (IMC New Zealand Council) iain@mathesonassociates.co.nz
Information correct at	November 2016

⁴ Those new to the consulting profession, might consider taking this online version of Essentials of Management Consulting over the face-to-face one, as additional time is spent preparing full consulting report deliverables for each stage in the consulting process based on the case study.

3. Essentials of Management Consulting Face-To-Face Course

Introduction

Are you a practicing management consultant pursuing the Certified Management Consultant (CMC) designation? Are you a CMC looking to update your existing knowledge and skills and deliver superior value to your clients? Or are you considering consulting as a career move? Taught by one of Canada's leading management consultants and trainers, this intensive programme will teach you a quality repeatable process, and enable you to develop the skills, methodologies and tools that you need. As well as this face-to-face *Essentials of Management Consulting* course, an online 3 month version is also available (see Appendix 2); those new to the consulting profession may wish to consider taking the online version as additional time is spent preparing full consulting report deliverables for each stage in the consulting process based on the case study.

Overview

This course covers tools and techniques used by professional management consultants in undertaking client interventions, plus core additional skills around client communications, change management and teamwork. This programme covers most core elements of the *Certified Management Consultant (CMC) Competence Framework 2013* (International Council of Management Consulting Institutes, 2014).

Content

The course comprises of a half-day self-study advance preparation course which contains six modules. This is followed by an intensive interactive in-person workshop, over three consecutive days, designed to work through the five stage consulting process, introducing key activities, methodologies and tools associated with each stage in the process. A number of break-out activities have been designed to help participants discuss and apply key concepts in each stage using a case study that has specifically been developed for this programme.

1. **Winning and initiating the assignment:** Covers how successful consultants win and begin assignments. Experience shows the first steps can make or break client engagement.
2. **Diagnosing the problem:** How to diagnose the problem(s) and build a foundation for client commitment to act on your findings.
3. **Action planning and implementation:** How to develop solutions for your client's problems and win client approval to implement your recommendations.
4. **The importance of effective project transition and termination:** Learn the key activities to close an assignment and win future follow-up business.
5. **The client consultant relationship:** Great consulting is collaboration between consultant and client; making that work requires strong interpersonal skills and a professional process that can be learned and managed through the consulting process and interactive case study simulation used in this programme.
6. **How to manage change and your client's capabilities:** This is an inherent part of management consulting. Consultants always introduce change as part of their consulting assignments. How you assess, nurture and build client capabilities will be the determinant of your success or failure.

Recommended text

While not essential, *Management Consulting: An Introduction to the Methodologies, Tools and Techniques of the Profession* Australian and New Zealand edition (available from IMC Australia) is a recommended textbook for this programme.

Further details

Facilitator	Kevin Schwenker FCMC (Canada)
Delivery organisation	Schwenker & Associates
Length	3 days plus half-day advance study course
Target	New ⁵ and experienced consultants (incl. internal)
Requirements	N/A
Location	Auckland and/or Wellington
Delivery mode	Interactive classroom-based
Group size	Limited to 20 people
Course availability	Annual or biennial
Assessment	Satisfactory completion of course requirements, and 70%+ achievement in individual final test
Accreditation	IMC and CMC-Canada
Any other endorsement	N/A
Certification	IMC New Zealand
Fees	To be announced Note: Reduced fee applies to all IMC New Zealand members and not just to those with the MIMCNZ/CMC designation i.e. includes associate, affiliate, accredited consulting practice, and Corporate Affiliate members
Alternative delivery modes	N/A
Enrolments and further information	Iain Matheson (IMC New Zealand Council) iain@mathesonassociates.co.nz
Information correct at	November 2016

⁵ Those new to the consulting profession might consider taking the online version of Essentials of Management Consulting over the face-to-face one, as additional time is spent preparing full consulting report deliverables for each stage in the consulting process based on the case study.

4. Diploma of Consultancy Programme

Introduction

Are you an experienced consultant looking to continue your professional development and be at the forefront of current consultancy practice? The Diploma of Consultancy has been designed and developed to suit the needs of experienced internal or external consultants. Through mentored assessment, this flexible, workplace-based programme provides consultants with a practical vocational qualification. The Diploma of Consultancy is nationally accredited in Australia by the Australian Skills Quality Authority, and endorsed by both IMC Australia and IMC New Zealand. A minimum of five years' consultancy experience is normally a programme pre-requisite. The programme aligns closely with the international *Certified Management Consultant (CMC) Competence Framework 2013* (International Council of Management Consulting Institutes, 2014).

Overview

Graduates of this programme will acquire and confirm a wide range of practical consultancy skills and gain valuable insights into the key characteristics of successful consultants. Graduates will develop and demonstrate their skills in areas including: team, client and stakeholder relations; market and trend analysis; effective communications; problem solving; and the development and implementation of innovative business solutions. The Diploma of Consultancy is comprised of eight units of competence.

Content

1. **Determine consultancy prospect needs and expectations:** Establish prospect expectations; analyse prospect needs; and present brief for approval.
2. **Prepare consultancy proposal & gain approval:** Prepare and present proposal; conduct proposal negotiations; and gain approval.
3. **Prepare consultancy intervention plan:** Develop information and resources; prepare, discuss and finalise plan; and gain approval for plan.
4. **Implement consultancy intervention plan:** Initiate intervention; implement the plan; monitor and report progress; manage change and communication; and manage stakeholder interactions.
5. **Finalise consultancy intervention:** Supply deliverables and acceptance; close administrative requirements; and review intervention.
6. **Manage consultancy practice marketing:** Identify and analyse opportunities; market consultancy practice; and support client relationships.
7. **Manage resources of a consultancy practice:** Manage self and stakeholders; and implement practice information requirements.
8. **Manage planning and operations of a consultancy practice:** Review practice operations; contribute to, monitor and review strategic plan; support application of financial guidelines; and monitor financial activities.

Further details

Mentor/Assessor	Tony Simmonds CMC (Australia)
Delivery organisation	Interlink Technology Pty Ltd
Length	Highly flexible – up to several months as agreed
Target	Experienced internal and external consultants
Requirements	5+ years consultancy experience
Location	Workplace-based – Skype/email
Delivery mode	1:1
Group size	N/A
Programme availability	Continuously available
Assessment	Includes workplace observation, testimonials & documented evidence
Accreditation	Australian Skills Quality Authority accredited vocational qualification
Endorsement	IMC New Zealand (also endorsed by IMC Australia)
Certification	IMC New Zealand and Interlink Technology Pty Ltd
Fees	Members: A\$4,200 (plus any PayPal/bank charges – no GST) Non-members: A\$4,800 (plus any PayPal/bank charges – no GST)
Alternative delivery modes	N/A
Enrolments and further information	Full online brochure from ITPL website at http://www.itpl.com.au/wp-content/uploads/ITS-Diploma-of-Consultancy-Brochure.pdf For more information or enrolment contact John Stringer ITPL Training Coordinator at info@itpl.com.au or telephone +61 408 729 507
Information correct at	November 2016

5. Management Consulting Books and Articles

Management Consulting In New Zealand and Australia

- [Australian] Institute of Management Consultants (2012). *Management consulting: An Introduction to the methodologies, tools and techniques of the profession: Australian and New Zealand Edition*. Malvern, Australia: Author.
- IBISWorld. (2015). *Management consulting in Australia: Market research report* [Summary]. Retrieved from <http://www.ibisworld.com.au/industry/default.aspx?indid=1896>
- Institute of Management Consultants New Zealand. (2012). *Common body of knowledge* (Rev. ed.). Retrieved from <http://www.imcnz.org/images/uploaded/12846873021125883.pdf>
- Institute of Management Consultants New Zealand. (n.d.). *Code of professional conduct*. Retrieved from http://www.imcnz.org/code_of_professional_conduct.asp
- New Zealand Trade and Enterprise. (2015). *Consultancy services*. Retrieved from <https://www.nzte.govt.nz/en/buy/our-sectors/consultancy-services/>
- Senior, P. (2004, March). Consultants: Why credibility is crucial. *New Zealand Management*, 68-69.

The Management Consulting Profession

- CMC-Canada. (2015). *On the value of the CMC designation*. [CMC-Canada position paper]. Retrieved from <https://higherlogicdownload.s3.amazonaws.com/CMCCANADA/6ae61369-ed65-4d46-87b4-976096e78fa2/UploadedImages/PDFs/Value%20Position%20Paper.pdf>
- International Council of Management Consulting Institutes. (2012). *The ICMCI: 25 Years of achievement 1987-2012*. Retrieved from http://issuu.com/cmccanada/docs/icmci_25_magazine
- International Labour Organization. (2002). *Management consulting. A guide to the profession* (4th ed.). Geneva, Switzerland: Author.
- McKenna, C. D. (2010). *The world's newest profession: Management consulting in the twentieth century*. Cambridge, England: Cambridge University.
- Toppin, G., & Czerniawska, F. (2005). *Business consulting: A guide to how it works and how to make it work*. London, England: Profile.

Management Consulting Marketing, Pricing & Sales

- CMC-Canada. (2015). *The effective use of price as a criterion in proposal assessment for management consulting services* [CMC-Canada position paper]. Retrieved from <https://higherlogicdownload.s3.amazonaws.com/CMCCANADA/6ae61369-ed65-4d46-87b4-976096e78fa2/UploadedImages/PDFs/Procurement%20Position%20Paper.pdf>
- Czerniawska, F. (2002). *Value based consulting*. London, England: Palgrave.
- Frederiksen, L. W., Harr, E., & Montgomery, S. S. (2014). *The visible expert: How to create industry stars. And why every professional services firm should care*. Reston, VA: Hinge Research Institute.
- Levinson, J. C., & McLaughlin, M. W. (2005). *Guerrilla marketing for consultants: Breakthrough tactics for winning profitable clients*. Hoboken, NY: Wiley.
- McLaughlin, M. W. (2009). *Winning the professional services sale: Unconventional strategies to reach more clients, land profitable work, and maintain your sanity*. Hoboken, NY: Wiley.
- Shays, E. M. (2008). *Pricing consulting services: How to set fees for the value you deliver*. Burlingame, CA: Consultants Clearing House.

The Practice of Management Consulting

- Block, P. (2011). *Flawless consulting: A guide to getting your expertise used* (3rd ed.). San Francisco, CA: Pfeiffer.
- Brooks, A. K., & Edwards, K. (2014). *Consulting in uncertainty: The power of inquiry*. New York, NY: Routledge.
- Clark, T., & Kipping, M. (Eds.). (2012). *The Oxford handbook of management consulting*. Oxford, England: Oxford University.
- CMC-Canada. (2010). *Management consulting: An introduction to the methodologies, tools and techniques of the profession*. Toronto, ON: Author.
- Cope, M. (2013). *The seven C's of consulting* (3rd ed.). London, England: Prentice-Hall.
- Czerniawska, F., & May, P. (2005). *Management consulting in practice: Award-winning international case studies*. London, England: Kogan Page.
- Johnston, M. (2008). *Smarter consulting*, Harlow, England: Pearson Education.
- Maister, D. H., Green, C., & Galford, R. (2002). *The trusted advisor*. New York, NY: Free Press.
- Newton, R. (2010). *The management consultant: Mastering the art of consultancy*. Harlow, England: Pearson Education.
- O'Mahoney, J., & Markham, C. (2013). *Management consultancy* (2nd ed.). Oxford, England: Oxford University.
- Schaffer, R. H. (2002). *High-impact consulting: How clients and consultants can work together to achieve extraordinary results* (2nd ed.). San Francisco, CA: Jossey-Bass.
- Schwenker, K. (2007). *The essentials of management consulting reader*. Toronto ON: CMC-Canada.

Establishing New And Growing Existing Management Consulting Firms

- Biech, E. (2001). *The consultant's quick start guide: An action plan for your first year in business*. San Francisco, CA: Jossey-Bass/Pfeiffer.
- Lambert, T. (1993). *High income consulting: How to build and market your professional practice*. London, England: Nicholas Brealey.
- Maister, D. H. (2003). *Managing the professional services firm*. New York, NY: Free Press.
- Weiss, A. (2006). *Million dollar consulting toolkit: Step-by-step guidance, checklists, templates, and samples from The Million Dollar Consultant*. Hoboken, NY: Wiley.
- Weiss, A. (2009). *Getting started in consulting* (3rd ed.). Hoboken, NY: Wiley.
- Weiss, A., & Khan, O. (2009). *The global consultant: How to make seven figures across borders*. Hoboken, NY: Wiley.

Purchasing Management Consultancy Services

- Czerniawska, F., & Smith, P. (2010). *Buying professional services: How to get value for money from consultants and other professional services providers*. London, England: The Economist.
- Page, C. (1998). How clients pick management consultants in Australia and New Zealand. *Journal of Management Consulting*, 10(2), 56-58.
- Perchthold, G., & Sutton, J. (2010). *Extract value from consultants*. Austin, TX: Greenleaf.
- Sammons, P. (2005). *Buying knowledge: Effective acquisition of external knowledge*. Aldershot, England: Gower.

Other Recommended Business Titles

- Angwin, D., & Cummings, S. (2015). *Strategy builder: How to create and communicate more effective strategies*. Chichester, England: Wiley.
- Argyris, C., & Schön, D.A. (1974). *Theory in practice: Increasing professional effectiveness*. San Francisco, CA: Jossey-Bass.
- Bossidy, L., & Charan, R. (with Burck, C). (2011). *Execution: The discipline of getting things done* (Rev. ed.). NYC, NY: Crown Business.
- Brassard, M., & Ritter, D. (2010). *The memory jogger 2: Tools for continuous improvement and effective planning* (2nd ed.). Salem, NH: GOAL/QPC.
- Cummings, S., Bridgeman, T., & Brown, K. (2016). Unfreezing change as three steps. *Human Relations*, 69(1), 33-60.
- D'Souza, S., & Renner, D. (2014). *Not knowing: The art of turning uncertainty into opportunity*. London, England: LID publishing.
- Haitt, J. M. (2006). *ADKAR: A model for change in business, government and our community*. Loveland, CO: Prosci.
- Hindle, T. (2008). *The Economist: Guide to management ideas and gurus*. London, England: Profile.
- Kiechel, W. (2010). *The lords of strategy: The secret intellectual history of the new corporate world*. Boston, MA. Harvard Business School.
- Osterwalder, A., & Pigneur, Y. (2010). *Business model generation: A handbook for visionaries, game changers, and challengers*. Hoboken, NJ: Wiley.
- Schön, D. A. (1983). *The reflective practitioner. How professionals think in action*. New York, NY: Basic Books.

6. Management Consulting Websites and Resources

Author websites

Title	Alan Weiss website
Details	Books, audios, online learning and home study
Website	http://www.alanweiss.com/store/
Cost	Material ranges from US\$16 to US\$4,200

Title	Alan Weiss' Million Dollar Consulting checklists and templates
Details	Resource of 17 checklists and templates supporting his Million Dollar Consulting book
Website	http://www.alanweiss.com/resources/forms-and-templates-from-the-million-dollar-consulting-toolkit/
Cost	No charge

Title	Mindshare Consulting (Michael McLaughlin)
Details	100+ articles by Michael McLaughlin, co-author of <i>Guerrilla Marketing for Consultants</i> (2003), on topics such as client relationship management, the consulting process, practice management, marketing, pricing, and selling.
Website	http://mindshareconsulting.com/articles/
Cost	No charge

Title	Peter Block's website
Details	Articles, interviews, e-documents, essays and forwards, and recordings.
Website	http://peterblock.com/publications/ http://peterblock.com/recordings/
Cost	Mostly no charge

Title	Sourceforconsulting.com (co-founded by Fiona Czerniawska).
Details	This UK-based company undertakes (market) research in relation to management consultancy, and national, regional and international trends.
Website	http://www.sourceforconsulting.com/free_publications.htm
Cost	No charges for the above reports (although selling other reports is a key focus of the website).

Title	David Maister's website
Details	Website of David Maister – author of six best-selling titles including <i>The Trusted Advisor</i> (2000). Expert on the management of professional services firms (and specifically including management consulting firms). Blog, articles, podcasts, videos books and seminar notes etc.
Website	http://davidmaister.com
Cost	With the exception of the books, free access to all other website resources.

IMC New Zealand website and those of recommended sister ICMCI organisations

Title	IMC New Zealand
Details	The website of IMC New Zealand – the Institute of Management Consultants New Zealand
Website	www.imcnz.org
LinkedIn	https://www.linkedin.com/grp/home?gid=2958576
Twitter	@IMCNZ
Cost	N/A

Title	CMC-Canada website
Details	The very comprehensive website of CMC-Canada – the Canadian Association of Management Consultants. CMC-Canada has 3,000+ members and is arguably the most effective of the English speaking Institutes of Management Consulting. Particularly strong focus upon pre-CMC training.
Website	http://www.cmc-canada.ca/home
Cost	N/A

Title	IMC Australia website
Details	The website of IMC Australia – the Institute of Management Consultants Australia. Non IMC Australia members can sign up for website updates – particularly useful on announcements of conferences, seminars and other events, etc.
Website	https://www.imc.org.au
Cost	N/A

Title	IMCA Ireland
Details	The website of the Institute of Management Consultants and Advisers Ireland. Interesting calendar of events.
Website	www.imca.ie
Cost	N/A

Title	IMC USA
Details	The website of IMC USA – the Institute of Management Consultants USA. IMC USA has an interesting history and its first chair in 1968 was Marvin Bower, the well-known Chairman of McKinsey. However, with a membership of 1,300, much smaller than Canada-CMC. Of note, IMC USA has established a charitable foundation with a particular focus upon ethics; it also has ISO/IEC 17024:2003 accreditation as a certification body.
Website	www.imcusa.org
Cost	N/A

Title	Institute of Consulting UK
Details	The website of the UK Institute of Consulting; part of the Chartered Management Institute (CMI). The organisation has 5,000+ members although only 1,200 are CMCs (they also have a Certified Business Adviser Award). There is a strong focus upon training and qualifications provided by licensed companies and tertiary institutions; there are some courses that can be undertaken on-line/distance learning from New Zealand.
Website	http://www.icon consulting.org.uk/
Cost	N/A

Title	ICMCI
Details	The website of ICMCI – the website of the International Council of Management Consulting Institutes. The site also includes links to the websites of all 52 member countries, including several others in the Asia-Pacific region (Australia, Bangladesh, China, Chinese-Taipei, Hong Kong, Japan, Malaysia, Myanmar, Philippines, Singapore and Thailand)
Website	http://www.icmci.org/
Cost	N/A

Other websites

Title	Association of Management Consulting Firms (AMCF)
Details	Longstanding US/International body for consulting firms with 3+ consultants and revenues over US\$1 million per annum (individual membership is also available to employed professionals in management consulting). Has its own Code of Ethics. At the time of writing had 31 member firms of various sizes. Produces an annual <i>Operating Ratios Report for Management Consulting Firms</i> benchmarking resource on fee arrangements, financial operations, recruiting and staffing practices, and business development costs. Also carries some US management consulting employment opportunities.
Website	http://www.amcf.org
Cost	Up to \$1,124 for Operating Ratios Report

Title	Business Performance Improvement Resource (BPIR)
Details	Free access to 600 academic and professional business journals, 1m business articles, case studies, benchmarking reports, networks and discussion forums
Website	http://www.bpir.com
Cost	Membership for individual Consultant/Business Adviser membership starts at \$427 (27 June 2015) annually. However, membership is free to individual IMC New Zealand members.

Title	CMC Today
Details	Newsletter of the International Council of Management Consulting Institutes.
Website	http://www.icmci.org/newsletter or by registration
Cost	N/A

Title	EN 16114 Management Consulting Services
Details	Under the auspices of the European Committee for Standardization (CEN), a website to support the 2011 launch of the European Union management consulting services standards
Website	http://www.en16114.eu/index.html
Cost	No charge

Title	Hinge Marketing Library
Details	Website for US-based firm specialising in branding and marketing for professional services firms. Large selection of free e-books, research studies, guides, articles, newsletters, white papers, webinars, video and audio, and blog.
Website	http://www.hingemarketing.com/library
Cost	No charge

Title	Management Consulting News
Details	Longstanding US-based specialist monthly newsletter/website which is also run by Michael McLaughlan – co-author of Guerrilla Marketing for Consultants(2003)
Website	http://managementconsultingnews.com
Cost	No charge

