



What's New in the Common Body of Knowledge & Recent Updates to the Essentials of Management Consulting

Kevin Schwenker, FCMC, CMC-AF
Husam Sha'ath, FCMC

April 12, 2023 12:30 p.m. ET



A HIGHER LEVEL of
management consulting
ONTARIO



Un NIVEAU SUPÉRIEUR
de conseil en management
ONTARIO





WHAT'S UP NEXT

The 2nd Wednesday of the month 12:30pm eastern

- ❑ April 25 – Ontario AGM
- ❑ May 10, 2023 – Entrepreneurial Operating System with Scott Morin
- ❑ June 14, 2023 – How to Effectively Partner with Indigenous Firms with Dale Booth and guest host Jennifer Smith
- ❑ June 16, 2023 – How to Set-up Change for Success – SCbD with Louise Harris
 - ❑ Certificate course
 - ❑ Earn 10 CPD points
 - ❑ Members receive a 30% discount



How to Setup Change for Success

June 16 to 30, 2023



CMC Pro Bono Program

SEEKING VOLUNTEER CMCs!

Currently recruiting additional volunteers for an Ontario-wide launch this fall.

Most requested skill sets:

- *Governance*
- *Human resources*
- *Program evaluation*

For more info, contact
probono@cmc-ontario.ca



How to Participate

- Participant controls in the lower left corner of the Zoom screen
- You will be muted for this call
- To ask a question – Type the question into the chat tool.
- We kindly ask that you turn your Video on if you are able to. We want to see your smiling faces!
- This session will be recorded
- A copy of the presentation will be available after the event.



ABOUT OUR PRESENTER

Kevin Schwenker

FCMC, ROES, CMC-AF

- ❑ Over thirty-five years as an independent management consultant
- ❑ Honoured with the Golden Jubilee Award as one of the builders of the profession on the 50th anniversary of CMC-Canada in 2013
- ❑ Led the team which wrote *Management Consulting: An Introduction to the Methodologies, Tools, and Techniques of the Profession* which was published by CMC-Canada in 2010



ABOUT OUR PRESENTER

Husam Sha'ath

BSc, MBA, FCMC, PMP, Prosci®, CEng, MIMechE, MRAeS

- ❑ Seasoned consultant, coach, instructor and practitioner in the field of Strategic Management and Implementation
- ❑ Founder and President of FORTE Management Consulting Inc.,
- ❑ Teaches at the University of Toronto – School of Continuing Studies (SCS), and other academic institutions on a part-time basis
- ❑ Teaches the Certification courses at the Canadian Association of Management Consultants





The Common Body of Knowledge



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Exactly what is the CBK for Management Consulting?



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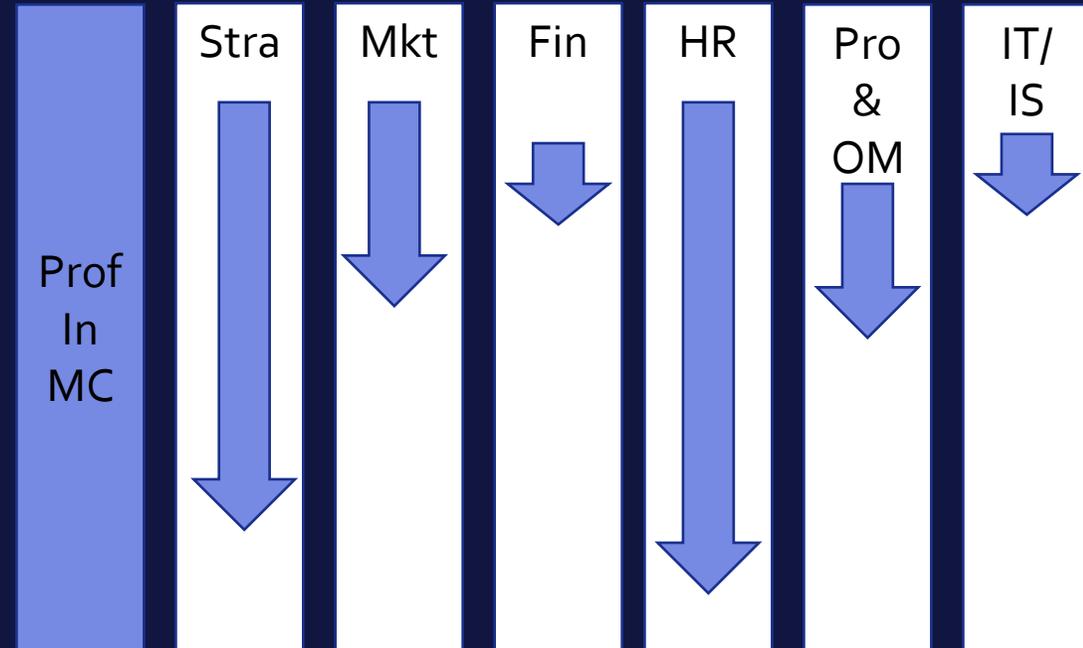
CMC-Canada Common Body of Knowledge

- Professionalism in MC
 - Process, Methods, Tools
 - Communications
 - Change Management
 - Teamwork
 - Practice Management

Prof
In
MC

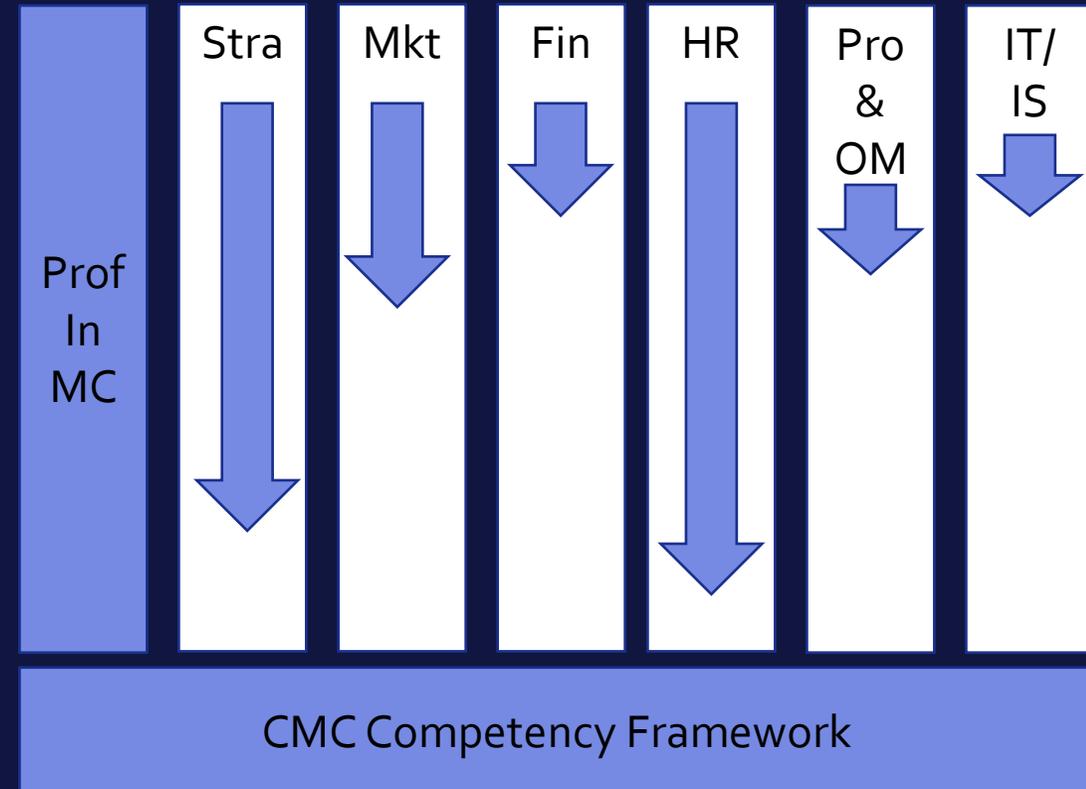
CMC-Canada Common Body of Knowledge

- Professionalism in MC
- Breadth – 6 Functional Areas
 - Minimal levels in all 6
 - Depth in 2–3 areas



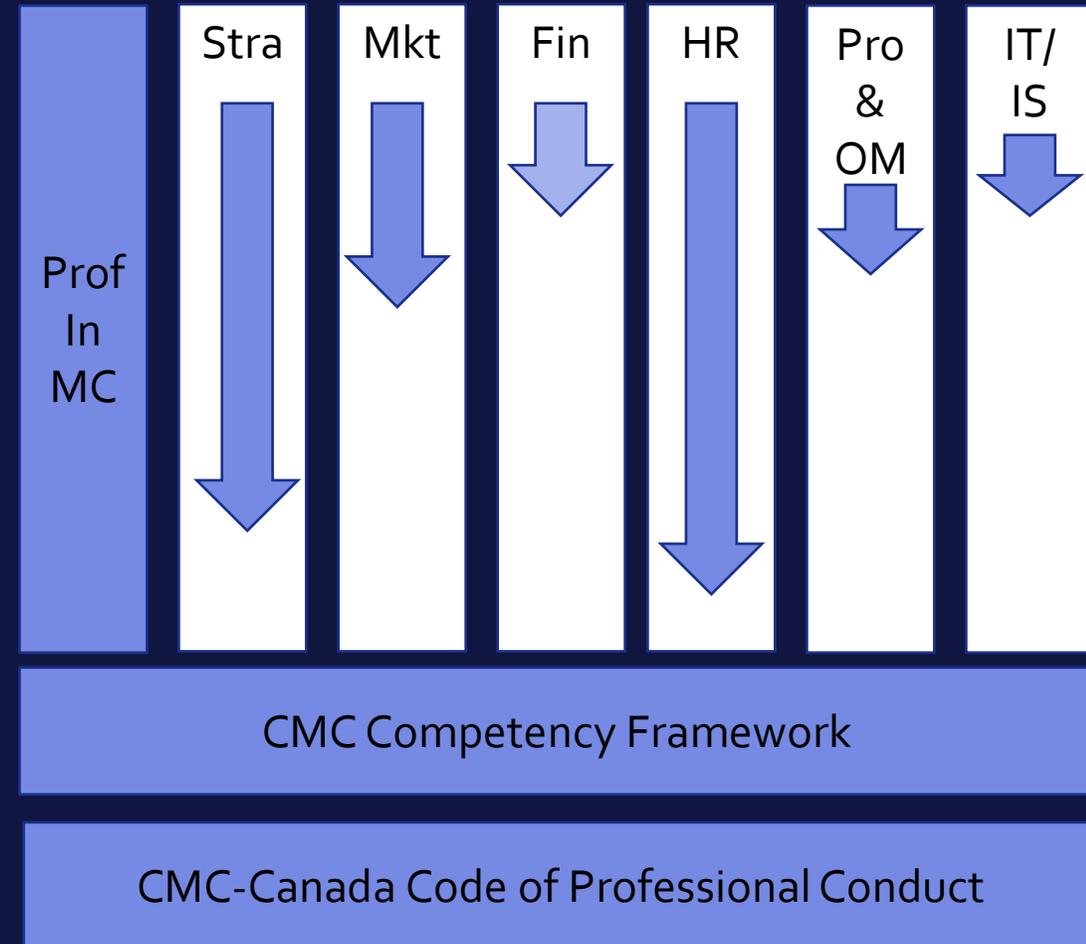
CMC-Canada Common Body of Knowledge

- Professionalism in MC
- Breadth – 6 Functional Areas
- CMC Competency Framework
 - Revised in 2018



CMC-Canada Common Body of Knowledge

- Professionalism in MC
- Breadth – 6 Functional Areas
- CMC Competency Framework
- Code of Professional Conduct
 - First established in 1967
 - Interpretations included in 2008
 - Last Updated in 2016



**COMMON BODY OF KNOWLEDGE
TRONC COMMUN DE CONNAISSANCES**

**Fourth Edition
September 1993**

**Quatrième Édition
septembre 1993**

**INSTITUTE OF
CERTIFIED MANAGEMENT CONSULTANTS
OF CANADA**

**INSTITUT DES
CONSEILLERS EN MANAGEMENT
DU CANADA**

History of the Canadian CBK

- First Edition was in the early 80's
- Fifth Edition was 1997

FOREWORD

Management consulting is an applied combination of skills, abilities, and knowledge. The Common Body of Knowledge (CBK) defines the knowledge component for the profession. It is accepted by each Provincial Institute and by the national coordinating body for the profession, the Institute of Certified Management Consultants of Canada (ICMCC).

The CBK provides the basis for assessing applications for membership by an Institute, developing education programs, administering national examinations leading to certification, and professional development programs following certification.

The CBK is a living document, with all the dynamism of the profession which it represents. The version before you is the fourth - reviews will take place on a two-year cycle to ensure it remains current and relevant to individual members and the consulting profession. Responsibility for this process lies with the ICMCC Standards and Certification Committee. We would be pleased to hear from any member or Institute, concerning any aspect of the CBK.

Gay Gooderham, CMC
Chair, Standards & Certification Committee

ACKNOWLEDGEMENTS

We wish to thank all those who have contributed to the evolution of this Common Body of Knowledge. Our special gratitude is extended to the Provincial Institutes for their ongoing support and volunteer resources.

Consulting Skills and Knowledge

Forward to the 4th Edition, 1993

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COMMON BODY OF KNOWLEDGE
CONSULTING SKILLS AND KNOWLEDGE

THE MANAGEMENT CONSULTING PROFESSION

TOPICS	ELEMENTS	READINGS
1. Origins of consulting		Handbook Material
2. What is management consulting?		G & M - 1 ILO - 1 Handbook Material
3. Multiple roles of the CMC		G & M - 2
4. Range and scope of management consulting		ILO - 2
5. Trends in consulting		ILO - 1 p. 8-11, 23, 35
6. Types of clients		G & M - 16
7. Professional management consulting as a profession		ILO - 27
8. What makes an effective consultant?		G & M - 3
9. Professionalism	a. Management consulting as a profession	ILO - 6
	b. Responsibility of a CMC	Handbook Material ILO - 6
	c. Professional associations	Handbook Material ILO - 6
	d) Institute policies and activities	Handbook Material

The Management Consulting Profession

TOPICS	ELEMENTS	READINGS
	e) ICMCC	Handbook Material
	f) Other organizations	ILO - app 2
10. Ethics	a. Ethical issues	G & M - 17
	b. Institute Code of Professional Conduct	Handbook Material



THE CONSULTING PROCESS

TOPICS	ELEMENTS	READINGS
1. The management of change		ILO - 4 G & M - 14
2. The professional consultant/client relationship		ILO - 3 G & M - 12
3. Process consultation		ILO - app 7
4. Types of interventions		ILO - 3

The Consulting Process

THE CONSULTING ASSIGNMENT

TOPICS	ELEMENTS	READINGS
1. Initial contact or entry	a. Making first contact	G & M - 12 ILO - 7
	b. Helping identify and clarify the need for change	G & M - 4
	c. Exploring the readiness for change	
	d. Exploring the potential for working together	
2. Contract and relationship	a. What outcomes are desired?	ILO - 7
	b. Who should do what?	G & M - 5
	c. Time perspective and accountability	
	d. Estimating, quoting and presenting a proposal	
3. Project assignment management		ILO - 24
4. Problem identification and diagnostic analysis	a. The management survey	ILO - 7
	b. Financial appraisal	ILO - 13
	c. Fact-finding	ILO - 8 G & M - 11
	d. Analysis	ILO - 9
	e. Diagnosing the issues	G & M - 13

The Consulting Assignment

5. Goal-Setting and planning	a. Project goals	ILO - 10, 24
	b. Planning for action and involvements	
	c. Staffing assignments	
6. Implementation and evaluation		ILO - 10, 11
7. Contract completion		ILO - 11 G & M - 15
8. Evaluation		ILO - 11, p. 201 - 205

The entire document provided references to two consulting texts and a handbook on 'Institutes and Ethics'. The Functional Areas also had references to texts current in the day.



An Expanded CBK – Published 2000

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EXPANDED COMMON BODY OF KNOWLEDGE

- FINANCIAL MANAGEMENT
- HUMAN RESOURCES MANAGEMENT
- INFORMATION TECHNOLOGY MANAGEMENT
- MARKETING MANAGEMENT
- OPERATIONS MANAGEMENT
- STRATEGIC MANAGEMENT

Financial Management

FINANCIAL MANAGEMENT

1 Introduction

All management consultants need to have a basic understanding of finance and accounting, even if they have no intention of ever practising as financial advisors. There are few consulting engagements which are not touched in some way by a financial issue, and practising consultants must, in any case, manage their financial relationships with clients and understand the accounting of their own practices if they are to stay in business.

This CBK for Financial Management serves as a primer for consultants who aspire to be "financially literate", a prerequisite for obtaining a CMC designation. The material is organized in segments (see index) which match sections or chapter headings of most common financial texts. The CBK starts with a general introduction to financial management and management accounting, touches broadly on the environment in which financial managers operate, covers the fundamentals of accounting, budgeting and costing, and then addresses the most common and important areas of financial management.

Human Resources Management

HUMAN RESOURCES MANAGEMENT

Contents of the Common Body of Knowledge

The Common Body of Knowledge for Human Resources covers seven major components of the Human Resources function as well as an overview. These components are:

- The Growing Importance of Human Resource Management
- Planning for HR Needs
- Recruiting and Selecting
- Total Compensation
- Appraising Performance
- Maximizing Human Potential
- Maintaining Effective Employee/Labour Relations
- Strategic Human Resource Management

Each of these components is summarized in this document and the appropriate references are indicated.

Information Technology

1. Introduction

All management consultants need a basic understanding of information technology (IT) and the management practices in IT, even if they do not intend to practice as IT professionals.

There are few consulting engagements that are not affected in some way by technology issues or incorporate technology into the solution. Practicing consultants need to effectively use IT to manage both their consulting processes and deliverables.

This common body of knowledge (CBK) for IT serves as a primer for consultants who aspire to be “computer literate,” a pre-requisite for obtaining the CMC designation. The CBK material is organized into the following sections:

1. IT history, basics and applications;
2. management of IT;
3. IT roles and perspectives; and
4. the IT consulting process.

Marketing Management

The Marketing Management Common Body of Knowledge is divided into the following six sections with corresponding subsections:

I. Understanding Marketing Management

- Understanding the Critical Role of Marketing in Organizations and Society
- Building Customer Satisfaction Through Quality, Service and Value
- Laying the Groundwork Through Market-Oriented Strategic Planning
- Managing the Marketing Process and Marketing Planning

II. Analyzing Marketing Opportunities

- Marketing Information Systems and Marketing Research
- Analyzing the Marketing Environment
- Analyzing Consumer Markets and Buyer Behaviour
- Analyzing Business Markets and Business Buying Behaviour
- Analyzing Industries and Competitors

III. Researching and Selecting Target Markets

- Measuring and Forecasting Market Demand
- Identifying Market Segments and Selecting Target Markets

IV. Developing Marketing Strategies

- Differentiating and Positioning the Marketing Offer
- Developing, Testing, and Launching New Products and Services
- Managing Product Life Cycles and Strategies
- Designing Marketing Strategies for Market Leaders, Challengers, Followers, and Nichers
- Designing Strategies for the Global Marketplace

V. Planning Marketing Programs

- Managing Product Lines, Brands, and Packaging
- Managing Service Businesses and Ancillary Services
- Designing Pricing Strategies and Programs
- Selecting and Managing Marketing Channels
- Managing Retailing, Wholesaling, and Physical-Distribution Systems
- Designing Communication and Promotion Mix Strategies
- Designing Effective Advertising Programs
- Designing Direct-Marketing, Sales-Promotion, and Public-Relations Programs
- Managing the Salesforce

VI. Organizing, Implementing, and Controlling Marketing Effort

- Organizing and Implementing Marketing Programs
- Evaluating and Controlling Marketing Performance

Production-Operations Management

Background

The common body of knowledge defined by ICMCC is broken into six areas which together summarize all major management activities required in any organization, large or small, private or public. These areas are Strategy, Marketing, Finance, Human Resources, Information Technology, and Operations. Although this division is convenient, it is also somewhat artificial, as the activities of every organization form an integrated whole.

This document is intended as a guide to the spectrum of topics in the area of Operations with which every management consultant should be familiar. Operations management is concerned with the work an organization must do to satisfy its customers. This is the system by which the organization's inputs are transformed into outputs. The issue is to ensure that all required resources are made available at the right time, in the right quantity and the right place so that the work can be accomplished most effectively.

For our purposes the subject matter of operations management is organized into four main topics: product and process development; logistics management; work management ; and facilities management. The subject matter is not as discrete as these topics imply; rather, it forms a continuous body of accumulated knowledge. Further, the specific topics, actual nomenclature and terminology, and their relative importance, vary widely across the spectrum of industries and organizations which management consultants serve, and over time within any one organization. In addition, there is a plethora of acronyms and jargon which expands with each new management fad. This guide will use plain English as much as possible.

Strategic Management

STRATEGIC MANAGEMENT

Introduction to the Common Body of Knowledge

This Common Body of Knowledge provides an overview of Strategic Management. The first section describes the basic elements and the key roles to be played. Section 2 describes the analyses and factors to be considered for each element in the planning part of the process. The final section describes elements which are key for effective implementation of the plan.

The primary reference used in preparation of this Common Body of Knowledge was *Strategic Management: Formulation, Implementation and Control*, John A. Pearce & Richard B. Robinson. In most cases the section headings in this document correspond to the section headings used in the text. More information and examples on any topic can be obtained by referring to the text.

Putting Some Meat on the Bones of *Professionalism*

- RFP Issued on July 6, 2005
- Contract issued Aug 8, 2005
- First Draft Submitted in September 2005
- Revisions Requested
- Final draft Submitted in December 2005
- NCC decided not to publish in May 2006



New Member Publication Coming Soon!

CMC-Canada will soon send all members their own hard copy of *Management Consulting: An Introduction to the Methodologies, Tools and Techniques of the Profession*, which is intended to be the first in a series of five books that together will form our Common Body of Knowledge, the definitive resource for professional management consultants. A \$200 value, each member will receive one copy free of charge. This Common Body of Knowledge will identify the standards for the profession in Canada so that clients can see the consistency and high level of expertise expected of the profession.

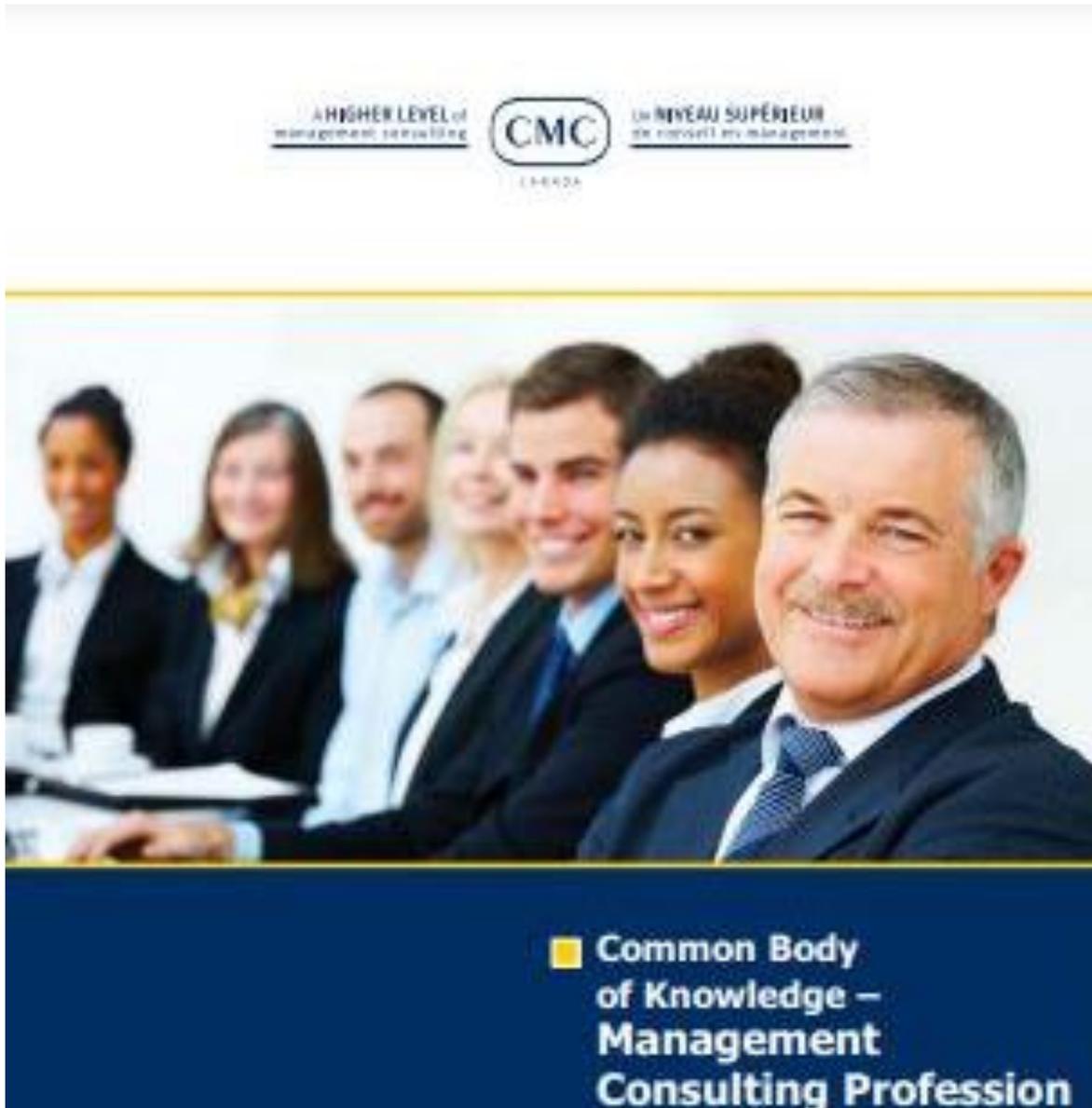
Watch your mailbox for your copy in September.

CMC-Atlantic Canada Newsletter, July 17, 2009.



CBK Resurrected

- Decision to Publish taken by Mary Blair in January 2009
- Originally announced to be published in September 2009
- Finally published in April 2010



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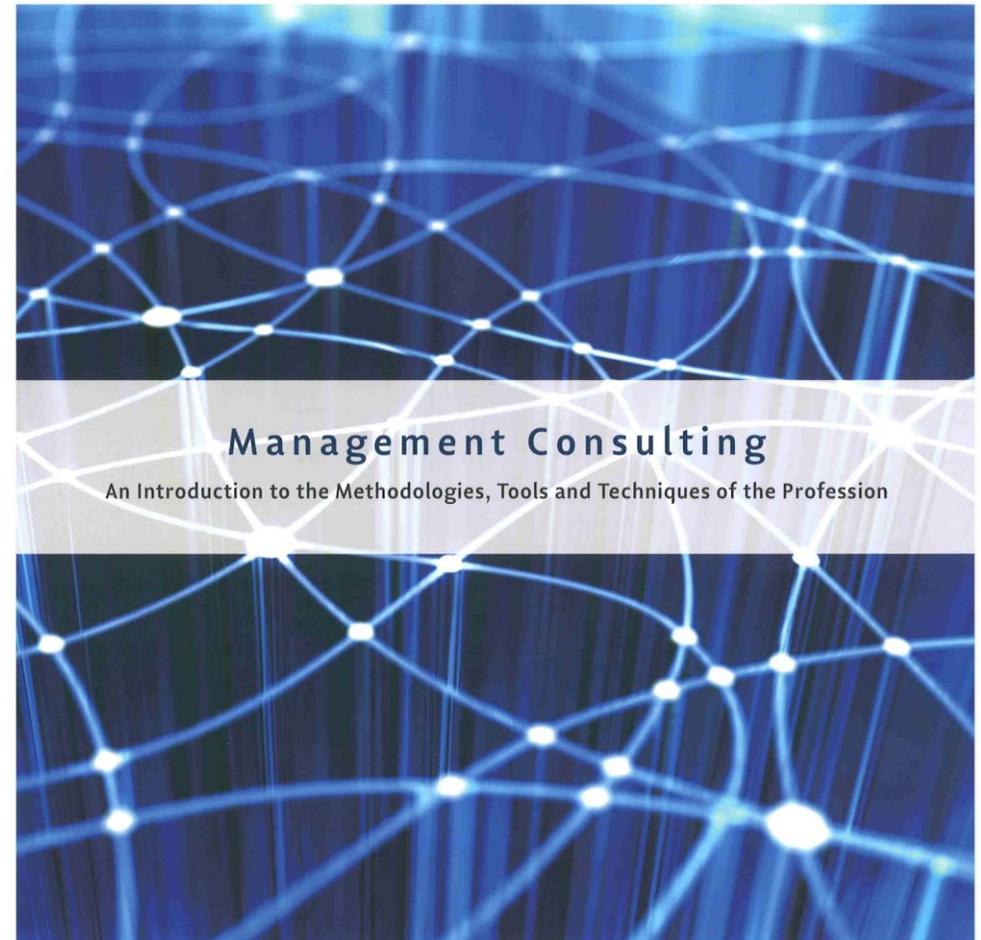
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Special thanks are extended to **Greg Richards**, CMC, and U of O Management Professor for updated section on Change Management for 2010 Text

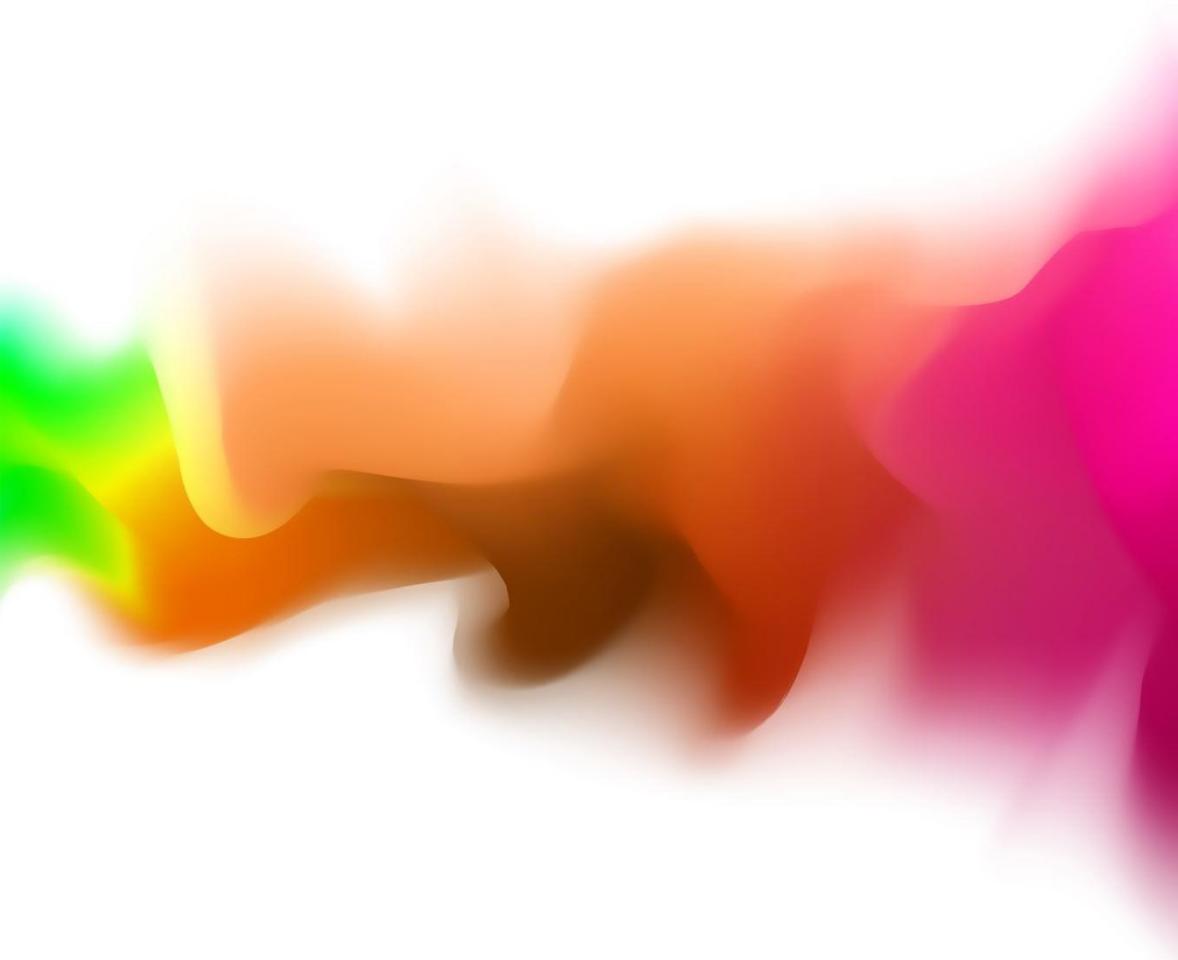


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(Final Cover of "The Methodologies" 2010)



Time to do an Update

Jan – Mar 2022 – Australia comes knocking

April – Editorial Committee Tagged

May–June 2022 – Final Process and Chapter Content contributors

July 2022 – Chapter update outlines submitted by contributors

Aug 22–Jan 23 – Based on feedback from the Editorial Committee, Drafting revised chapters took place



Chapter 2 – The Consulting Process

- Adding ISO 20700 Global Standard

Dwight Milhalicz
Kevin Schwenker



Chapter 3 – Effective Communication

- Confidentiality and security in a digital world
- Nuanced discussion of involving client “staff”
- Digital tools
- Appendix with Phase Report Templates

Landon Schmidt
Eric Anderson



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Chapter 4 – Change Management

- Increased emphasis on change readiness and change fatigue
- Expanded discussion of leading methodologies and frameworks
- International Professional Associations

Louise Harris
Dawn-Marie Turner



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Chapter 5 – Teamwork

- Contemporary collaborative models
- Team building tools and approaches
- Leading Global Teams

Judy Murphy
Dieter Wentzel
Marylka Empey

Chapter 6 – Practice Management

- Maister model of the “Professional Services Firm” is still a standout reference
- Collaborative approaches for independent, micro firms to bid on large projects

Steven Parker

Tim Kist



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The Certification Courses



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- The full 6-session EMC course delivered over 6 consecutive weeks
- No changes are planned for this year.
- A review will be conducted next year to ensure full alignment with the new version of the CBK
- Some changes may be necessary to ensure full alignment and mapping
- Changes in the future may cascade to the Executive EMC

The Essentials of Management Consulting (EMC)



- Based on the full 6-day EMC course
- Targets the Executive and Experienced Streams
- Introduced in 2022 as part of the Certification Weekends
- Delivered over two consecutive half-days online
- No plans for changes, however, future changes to the EMC Course might impact this Executive version

The Executive EMC



- A half-day course offered online
- Required for all streams of Certification applicants
- It runs independently of the EMC Course.
- Therefore no foreseen changes driven by the new CBK

Ethical Behaviour: Best Practices of Management Consultants





Questions

Please type in the chat



THANK YOU



INFO@CMC-ONTARIO.CA

<HTTPS://CMC-CANADA.CA/ONTARIO>