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**COMPETENCY FRAMEWORK for  
CERTIFIED MANAGEMENT CONSULTANTS**

The Canadian Association of Management Consultants (CMC-Canada) is pleased to release the Competency Framework of the Management Consulting profession. This 2018 publication was undertaken to update the previous 1999 version, and to take into account the changes in the profession in the last 20 years.

CMC-Canada's National Certification Committee managed the project, which was conducted by Jeff Griffiths FCMC of Griffiths Sheppard Consulting Group, of Calgary, Alberta in 2017-18. A draft Competency Framework was created through consultation with other Institutes of Management Consulting, CMC-Global, other professional associations, and two groups of invited CMC-Canada members: subject matter experts who considered the development of the list of competencies and others who validated it. All 2,500 CMC-Canada members were then invited to comment on the draft.

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#### **National Certification Committee**

Jon Pascoe FCMC, Chair  
 Donald Moors FCMC  
 Michael Stanleigh CMC  
 Randy Baldwin FCMC  
 Eric Inthof FCMC

#### **CMC-Canada staff**

Sarah McIntosh  
 Mary Blair, CAE

#### **Subject Matter Experts**

Kanina Blanchard CMC  
 Anne Charette-Tyler CMC  
 Noreen Irvine CMC  
 Alan Kennedy FCMC  
 Timothy Kist CMC  
 Jerry Kopan CMC  
 Bruce Madole CMC  
 David Malcolm CMC  
 Megan McDougald CMC  
 Inga Sheane CMC  
 Stan Swartz CMC  
 Kevin Aguanno CMC  
 Kelly Culver CMC  
 Brian Hurley CMC  
 Michael Majeed CMC  
 Jeff Noble CMC  
 Kevin Schwenker FCMC  
 John Singh CMC  
 Sean Sweeney FCMC  
 Mark Wiittrup CMC

## CMC Competency Framework

The CMC Competence Framework specifies the cluster 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; all of which are underpinned by a code of conduct and professional ethics – professional behaviours. It sets out a standard for those within the profession that is equally relevant for sole practitioners, niche players, and internal consultancies as well as for the major practices and firms. It can be used as a benchmark for clients in developing their expectations of consultants as well as by academic bodies and training providers to align offerings to the market.

The *competency framework* for the *profession* is a hierarchical structure made up of a number of *competence clusters*, which are groups of *related competencies*. Each of the competencies is further subdivided into *sub-competencies*, for which performance statements are developed to describe objective *‘evidence of competent practice’*. This hierarchical structure can be illustrated as:

- Scope of the profession
  - Competence clusters
    - Competence classes
      - Competencies
        - Sub-competencies
          - Evidence of competent practice

The Competence Clusters of the CMC Competency Framework are:

1. **Business Competence**, which refers to the application of fact-based knowledge of technical skills, business understanding, sector insight, and external awareness. This cluster is subdivided into two **competence classes**:
  - A - Client Business Insight**, which is the set of discrete *competencies* that allow a CMC to understand the client condition in the context of the client’s operating, regulatory and competitive environments; and
  - B - Consulting Business Insight**, which is the set of discrete *competencies* pertaining to the business of consulting itself, and the manner in which consulting services are marketed, procured and delivered. It may include matching resource requirements to client needs, sourcing resources (either internally or externally), and managing those resources in the context of the engagement.
  
2. **Technical Competence** refers to the core consulting skills, tools and techniques used by consultants to deliver professional service to clients. This cluster is further broken down into two **competence classes**:
  - C - Functional Specialization**, which is composed of the blend of *competencies* related to business, management, and sector/industry expertise that consultants bring to an assignment; and

**D – Engagement Management Skills**, which describe the *competencies* which consultants employ to manage client engagements and deliver consulting services.

3. **Values and Behavioural Competence** refers to the blend of professional values and skills that enable consultants to deliver results for clients now and into the future. They establish credibility and trust, leading to superior results. This cluster is broken down into four **competence classes**:

**E- Ethics and professionalism**, which is composed of the discrete *competencies* that reflect a consultant’s professional conduct and ethical behaviour,

**F- Analytical skills**, which describes the *competencies* for decision-making, problem solving and innovation/creative thinking that allow the CMC to deliver advice and solutions tailored to the client situation,

**G- Personal interaction skills**, which describe the set of *competencies* that allow the CMC to work effectively with others, and

**H – Continued Learning and Development**, which describe the *competencies* that allow the CMC to continue to learn, grow and develop their skills in the service of their clients and the profession.

A summary of these Competence Clusters is included at Appendix A.

The key to this concept are the individual **competencies and sub-competencies** – those things that a professional consultant is expected to do in the course of their practice. It helps to think of them as tasks or habits - discrete activities that are part of the professional life of a consultant whether they are engaged in client work, managing their practice and their business, or developing themselves.

Each competency is further elaborated with range statements that describe the behaviours that may be observed at three different **developmental levels**:

- **Development** – a consultant who is still learning their craft. Consultants at the development stage possess the minimum background skills and knowledge required to practise, but have little or limited practical experience as a consultant. They are generally in the process of acquiring additional skills, knowledge and experience to qualify as a CMC. They may have received training and education in consulting, and are gaining experience, often under the supervision or mentoring of a more senior consultant;
- **Independence** – an experienced professional. A consultant at the independence stage has the necessary depth and breadth of knowledge and skill, and demonstrated ability to apply that knowledge on a range of different client projects, environments and contexts. A CMC will demonstrate ability at the Independence level for all competencies
- **Profession Leader** – a recognized expert and leader within the profession. A consultant at the Profession Leader stage has significant practical experience coupled with broad and deep technical knowledge that allows them to provide exceptional service and value to clients. They are capable of managing large projects, large teams, and are recognized technical experts within their respective specialties They are often found leading large, complex projects involving multiple consultants.

In order to understand how these different developmental levels relate to each other, the following table compares expertise, scope of practice, organizational focus, and the value provided to the client at each level.

	Developmental Stage		
Characteristics	Development (a consultant gaining experience)	Independence (a consultant who meets the standard for the CMC)	Profession Leader (a highly experienced CMC)
Expertise	Provides technical skills/ experience to a project. Developing skills defined by Common Body of Knowledge (CBK) and Competency Framework (CF)	Secures, designs, and manages small consulting projects. Practises skills consistent with Common Body of Knowledge and Competency Framework	Can secure, design, and manage large, complex, team-based consulting projects. Meets highest international standards of competence, including CMC-Canada CBK and CF
Scope	Narrow specialty in a technical discipline / industry	Applies expertise across industries and disciplines	Creates new approaches to applying expertise across industries and disciplines
Organization focus	Tactical support to middle management.	General business advice to managers and executives	Broad strategic advice to senior managers and executives/Board of Directors
Value to Client	Solves technical/ tactical problems	Recommends and implements solutions to client needs	Sought by and considered a partner by executives. Long term engagements and retainer relationships are the norm

		Developmental Stage		
Commitment to Profession	May belong to technical and/or trade associations and to a CMC-Canada certifying institute. Does not subscribe to a formal code of ethics	Member of a CMC-Canada affiliated certifying Institute, and bound by the CMC-Canada Uniform Code of Professional Conduct. Is ready to be recognized as a CMC, and actively contributes to the profession.	Member of a CMC-Canada affiliated certifying Institute, and bound by the CMC-Canada Uniform Code of Professional Conduct. A CMC, actively contributing to professional organizations and the profession	
Experience	Less than 3 years as an external or internal management consultant	At least 3 years as an external or internal consultant with experience managing increasingly large complex projects	Greater than 10 years as an internal or external consultant	

#### Evidence of competent practice

Finally, each competency is elaborated with *evidence of competent practice* – objective criteria to gauge whether the competency is being performed at the level of proficiency expected of a CMC, which is, as noted above, at least at the Independence level.

**Evidence of competent practice** guidelines describe the types of behaviours, activities, processes, approaches, etc. followed by a CMC in the course of their practice. If a candidate for the CMC was being evaluated, this is the sort of evidence that one would expect to see reflected in the individual's engagement summaries, project reports, client notes, written articles, and other artifacts of practice.

#### Structure of the Workbook

This workbook is divided into sections, one for each of the competency classes. Each competency/sub competency is its own table, an example of which is shown below. For clarity, in the example, the items related to each level of the hierarchy are shaded the same colour (note this is not the case later in the workbook), with competence class at the top left, competency and sub competency numbered underneath. To the right, we have the range statements for the sub competency, and for each developmental level. Finally, we have space to write descriptions of the evidence of competent practice.

		Range Statements		
<b>COMPETENCE CLASS A</b>	<b>Competence Class Name: Client Business Insight</b>	<b>At the Development level, for THIS sub competency</b>	<b>At the Independence level, for THIS sub competency</b>	<b>At the Profession Leader level, for THIS sub competency</b>
	<b>Competence Class Description: Understands the internal and external factors impacting on the project</b>			
<b>Competency A1: Client understanding</b>	<b>Sub-competency A1.1</b>	<b>Understands core business structures, processes, management and disciplines</b>	<b>Researches and understands the client business, the sector in which it operates, and its stakeholders</b>	<b>Has credible depth of knowledge across a range of disciplines and business environments</b>
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the “Independence” level?</b></p> <p>Evidence of a process whereby the consultant conducts research, directly and indirectly, to discover the client environment. We would expect interview notes, notes from secondary research conducted, notes on specific business elements that have been sourced (financials, marketing information, competitor information, product information, etc.), and evidence that the individual understands the client, its competitive and regulatory environment. There should be evidence of tailoring the approach to the client and the engagement. This must be done in compliance with the Code requirements for confidentiality, due care, and objectivity.</p>				

## Scope of the Profession

### *Preamble*

Management consulting is an independent, professional advisory service assisting managers and organizations to achieve organizational purposes and objectives by solving management and business problems, identifying and seizing new opportunities, enhancing learning, and implementing changes.

This document describes the competencies of the Certified Management Consultant (CMC), an internationally recognized professional designation for the management consulting profession. This Canadian framework is based on, and amplifies, the framework of the International Council of Management Consulting Institutes (ICMCI), of which CMC-Canada (and the provincial/regional Certifying Institutes who award the designation) is a founding member.

Canadian CMCs are professional consultants who have undergone a rigorous certification process administered through their provincial/regional certifying institute, ensuring they have demonstrated the competencies herein described.

### ***Scope***

Certified Management Consultants (CMCs) are professionals who provide independent advice to client organizations, who may engage them either on a business-to-business (external) basis, or engage them in an internal advisory or business improvement capacity.

Certified Management Consultants may investigate and identify problems related to organizational policy, strategy, structure, governance, operational issues and processes, human resources, administration, technology, finance, regulatory affairs, sales and marketing, or any other organizational function.

CMCs follow a systematic approach to gathering and analyzing information in order to diagnose issues; they then apply their specialized knowledge and skills to develop and recommend solutions tailored to the unique requirements of the client organization. They may also be involved in assisting in the implementation these solutions in the client organization.

CMCs view the organization as a “socio-technical system” – they include in their analysis the complex interactions of individuals in the context of the technical and structural aspects of the organization, as well as its external environment. This systems perspective allows them to determine the most appropriate solutions in the client context.

CMCs have broad general knowledge of core management functions - including Finance, Information Technology, Marketing, Human Resources, Strategy, and Operations Management – which they augment with specialist knowledge (which may be in one of the above categories, or in a different discipline) to provide clients with an independent and objective view of the organization and its management techniques and practices.

### ***Emerging Trends Impacting the Profession***

The profession exists in and must continually adapt to a constantly changing world in order to continue to provide advice and solutions tailored to meet the needs of client organizations. Notable trends that Canadian CMCs must be cognizant of include:

- The continued shifting of geopolitical and economic power
- The emergence of populist political movements worldwide, with related implications for globalization, trade, protectionism, and social policy
- Responding to challenges of an aging workforce and declining birth rates, which will mean a greater emphasis on productivity
- The increased importance of environmental factors in business, including a shift away from fossil fuels, the emergence of clean/green technologies, and heightened awareness of the impacts of global climate change
- The ever-increasing importance of data security and the protection of personal information at all levels of the organization
- Increasing rates of technological change (AI, machine learning, robotics, fintech, data analytics) and their impact on both organizations and individuals,
- The emergence of social media as a medium for incredibly rapid, unfiltered dissemination of information and opinions
- The increasing understanding of the role of “Emotional Intelligence” and “transversal and soft skills” as crucial to effective consulting practice
- The increasing importance of social responsibility as a strategic consideration for organizations of all kinds



## COMPETENCE CLASS A: CLIENT BUSINESS INSIGHT

CMCs must have an understanding of the client business, including the internal and external environments; these factors all have the potential to impact the engagement, and the approach that will be taken by the consultant.

		Range Statements		
COMPETENCE CLASS A	Competence Class Name: Client Business Insight	At the Development level, for THIS sub competency	At the Independence level, for THIS sub competency	At the Profession Leader level, for THIS sub competency
	Competence Class Description: Understands the internal and external factors impacting on the project			
Competency A1: Client understanding	Sub-competency A1.1	Understands core business structures, processes, management principles and disciplines	Researches and understands the client business, the sector in which it operates, and its stakeholders	Has extensive and deep knowledge across a range of disciplines and business environments, and applies this to engagements and own practice.
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the “Independence” level?</b></p> <p>Evidence of a process whereby the consultant conducts research, directly and indirectly, to discover the client environment. We would expect interview notes (written, computer), notes from secondary research conducted, notes on specific business elements that have been sourced (financials, marketing information, competitor information, product information, etc.), and evidence that the consultant understands the client and the competitive and regulatory context in which it operates. There should be evidence that the consultant has tailored their approach to the client and the engagement. This must be done in compliance with the Code requirements for confidentiality, due care, and objectivity.</p>				

		Range Statements		
COMPETENCE CLASS A	Competence Class Name: Client Business Insight	At the Development level, for THIS sub competency	At the Independence level, for THIS sub competency	At the Profession Leader level, for THIS sub competency
	Competence Class Description: Understands the internal and external factors impacting on the project			
Competency A2: Client business knowledge	Sub-competency A2.1	Researches similar businesses and best practices that are applicable	Analyzes business culture, structures, processes, management and performance criteria specific to the client firm, based on scope of work	Has extensive and deep knowledge across a range of disciplines and business environments, and applies this to engagements and own practice.
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the “Independence” level?</b></p> <p>Evidence that the consultant has a process (questioning techniques, inquiry) for understanding the client business and organizational model as well as the culture of the client organization in order to truly understand the nuances of how the business functions and interacts internally. There should be evidence that the consultant is exercising due diligence, accessing information beyond what’s given to them by the client. There should be structure to their process, guided by a framework, which they are able to elaborate on and discuss in detail (what, how and why).</p>				

		Range Statements		
COMPETENCE CLASS A	Competence Class Name: Client Business Insight	At the Development level, for THIS sub competency	At the Independence level, for THIS sub competency	At the Profession Leader level, for THIS sub competency
	Competence Class Description: Understands the internal and external factors impacting on the project			
Competency A3: External awareness	Sub-competency A3.1	Uses a process to identify impact on client from political, economic, social, technological, legal and environmental factors	Formulates analysis for client including the current political, economic, social, technological, legal and environmental factors, and the impact on client and the client's customers.	Has extensive and deep knowledge across a range of disciplines and business environments, and can apply this knowledge in new contexts and innovative ways to achieve results.
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the "Independence" level?</b></p> <p>Evidence that the consultant has taken into account the relevant external environmental factors (regulatory, competitive, customer, etc.), and can articulate their process for determining and quantifying risks, and uses this information to determine an appropriate approach to the engagement.</p>				

## COMPETENCE CLASS B: Consulting Business Insight

CMCs must have an understanding of the business aspects of management consulting, and the competitive environment in which the consulting practice functions.

		Range Statements		
COMPETENCE CLASS B	Competence Class Name: Consulting Business Insight	At the Development level, for THIS sub competency	At the Independence level, for THIS sub competency	At the Profession Leader level, for THIS sub competency
	Competence Class Description: Understands the management consultancy environment and its commercial aspects			
Competency B1: Consultancy business knowledge	Sub-competency B1.1	Studies the structure of consulting including cash flow, profit and loss, intellectual property, risk management, local laws and regulations	Understands the nature of the management consultancy market, competitors and capabilities	Recognized as an expert on the management consulting market and environment
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the “Independence” level?</b></p> <p>Consultant should demonstrate knowledge of the capabilities and scope of competitor firms, including their service offerings, specific expertise, etc. Consultant is able to articulate an ethical approach for differentiating their offerings from competitors, emphasizing their individual strengths. Also, the consultant should be aware of their own limitations and be able to articulate how they mitigate the risks associated with those weaknesses.</p>				

		Range Statements		
<b>COMPETENCE CLASS B</b>	<b>Competence Class Name: Consulting Business Insight</b>	<b>At the Development level, for THIS sub competency</b>	<b>At the Independence level, for THIS sub competency</b>	<b>At the Profession Leader level, for THIS sub competency</b>
	<b>Competence Class Description: Understands the management consultancy environment and its commercial aspects</b>			
<b>Competency B2: Commercial aspects of assignments</b>	<b>Sub-competency B2.1</b>	Develops commercial awareness and participates, under supervision, in scoping, pricing, risk analysis, and setting terms and conditions	Demonstrates understanding of commercial aspects of projects including scoping, pricing, risk, and terms and conditions	Advises, coaches and mentors others in the commercial aspects of management consulting
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the “Independence” level?</b></p> <p>Can provide examples (memos, consultant notes, proposal documents, etc.) that accurately scope and price an engagement, including the associated risk assessment, with terms and conditions that accurately make provision for all engagement phases and comprehensively addresses those eventualities and risks. OR, where specific examples would be barred for confidentiality reasons, can provide hypothetical constructs that cover the same topics. Demonstrates a clear understanding of applicable contract law. Can demonstrate due diligence with respect to regulatory compliance (taxes, remittances), and demonstrates due diligence and the application of the ethical requirements of protection of client confidentiality, and client information, appropriate privacy laws, etc. Evidence could include professional thought leadership, including accurate and thoughtful articles/publications/presentations on topics related to some or all of these aspects of practice.</p>				

		Range Statements		
<b>COMPETENCE CLASS B</b>	<b>Competence Class Name: Consulting Business Insight</b>	<b>At the Development level, for THIS sub competency</b>	<b>At the Independence level, for THIS sub competency</b>	<b>At the Profession Leader level, for THIS sub competency</b>
	<b>Competence Class Description: Understands the management consultancy environment and its commercial aspects</b>			
<b>Competency B2: Commercial aspects of assignments</b>	<b>Sub-competency B2.2</b>	Develops self-marketing capability and taking part, under supervision, in negotiation of contracts	Demonstrates understanding of, and where appropriate uses, systematic methods to promote consultancy services for external and internal clients, to maintain a pipeline of opportunities and to negotiate and win contracts	Actively promotes the consulting profession through a network of contacts
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the “Independence” level?</b></p> <p>Demonstrates a grasp of ethical marketing practices for consulting services, including managing expectation, realistic assessment of value, and ensuring that sales/marketing behaviours are focused on the interest of the client. Can describe their marketing strategy and approaches, and provide samples of materials used for marketing/promoting their practice and profession. Can provide evidence of successful completion of projects, including testimonials from clients, engagement summaries, etc. Can explain their process for qualifying prospects and moving toward a contracted engagement. Can describe ethical methods for creating additional/follow-on engagements, and also explain circumstances when such work would be deemed questionable under the Code.</p>				

## COMPETENCE CLASS C: FUNCTIONAL SPECIALIZATION

In addition to general business knowledge, CMCs will have a functional specialization that allows them to provide specific expertise to clients.

		Range Statements		
COMPETENCE CLASS C	Competence Class Name: Functional Specialization	At the Development level, for THIS sub competency	At the Independence level, for THIS sub competency	At the Profession Leader level, for THIS sub competency
	Competence Class Description: Recognized as an expert in own discipline			
Competency C1: Functional knowledge and skills	Sub-competency C1.1	Builds sector technical expertise through education, qualifications and work experience	Shows evidence of at least one year's management consulting experience in the declared primary functional specialisation PLUS: <ul style="list-style-type: none"> <li>• A degree or professional qualification in the functional specialization, OR</li> <li>• At least four years specialized work experience in the functional specialization</li> </ul>	Acts as a leader/advisor/coach to others in own area of discipline
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the "Independence" level?</b></p> <p>The consultant is able to produce</p> <p>a) client references regarding successfully completed assignments within the area of functional specialization</p> <p>b) evidence of a serious intent of long term pursuit of expertise in the chosen area of functional specialization (e.g. enrolment in further training or credentialing programs, publication in professional/academic journals, evidence of public speaking within their area of specialization, membership in specific professional associations related to their functional specialty, etc.).</p>				

		Range Statements		
COMPETENCE CLASS C	Competence Class Name: Functional Specialization	At the Development level, for THIS sub competency	At the Independence level, for THIS sub competency	At the Profession Leader level, for THIS sub competency
	Competence class description: Recognized as an expert in own discipline			
Competency C2: Sectoral knowledge and experience	Sub Competency C2.1	Demonstrates knowledge of the sector in which work is carried out	Demonstrates how functional expertise has been applied in at least one business sector	Influences business thinking and agendas in one or more sectors
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the “Independence” level?</b></p> <p><b>NOTE: We are looking for evidence of the application of functional skills within one or more sectoral contexts.</b>  The consultant is able to produce any or all of</p> <ul style="list-style-type: none"> <li>a) client references and recommendations attesting to the consultant’s expertise within a specific functional subject</li> <li>b) evidence of ongoing publication or public speaking engagements on topics in the area of functional specialization</li> <li>c) evidence of teaching engagements on the area of specialization by a significant public sector or private sector organization or a recognized institution within the area of specialization or by a college or university</li> <li>d) evidence of awards, honours, or credentials by a relevant institution within the area of specialization.</li> </ul>				



## COMPETENCE CLASS D: Engagement Management

CMCs must be able to effectively manage all phases of the client engagement.

### Competence D1: Client Focus

		Range Statements		
COMPETENCE CLASS D	Competence Class Name: Engagement Management	At the Development level, for THIS sub competency	At the Independence level, for THIS sub competency	At the Profession Leader level, for THIS sub competency
	Competence Class Description: Determines the scope of client assignments. Manages client and other stakeholders' expectations. Engages expertise of others where appropriate			
Competency D1: Client focus	D1.1.1	Researches and understands client agenda and issues	Understands and defines client requirements as evidenced by client agreement	Utilizes knowledge of external issues and depth of experience to inform, challenge and define scope of work and expected timelines.
Sub-competency D1.1 Scoping client requirements				
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the "Independence" level?</b></p> <p>Demonstrates, through the use of proposal documents, engagement letters, project charter, and/or other documentation that the clients' requirements and desired outcomes are thoroughly understood. Engagement letter or contract documents signed off by client. Clearly indicate consultant and client (including specific client personnel where applicable) responsibilities at each stage of the project.</p>				

		Range Statements		
<b>COMPETENCE CLASS D</b>	<b>Competence Class Name:</b> Engagement Management	<b>At the Development level, for THIS sub competency</b>	<b>At the Independence level, for THIS sub competency</b>	<b>At the Profession Leader level, for THIS sub competency</b>
	<b>Competence Class Description:</b> Determines the scope of client assignments. Manages client and other stakeholders' expectations. Engages expertise of others where appropriate			
<b>Competency D1: Client focus</b>	<b>D1.1.2</b>	Where appropriate, presents clear comprehensive written proposals	Leads the development of clear, comprehensive written proposals, and presents these proposals to clients	Advises, coaches and mentors others in the development and presentation of project proposals
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the "Independence" level?</b></p> <p>Can provide sample proposals demonstrating an understanding and articulation of scope and limitations of the engagement, and who from client organization has approval authority on changes. Minutes/notes from contracting/scoping meetings with appropriate sign-offs can also provide this evidence. Where confidentiality precludes providing an actual proposal, is able to clearly articulate the process used to document scope and requirements in proposals.</p>				

		Range Statements		
COMPETENCE CLASS D	Competence Class Name: Engagement Management	At the Development level, for THIS sub competency	At the Independence level, for THIS sub competency	At the Profession Leader level, for THIS sub competency
	Competence Class Description: Determines the scope of client assignments. Manages client and other stakeholders' expectations. Engages expertise of others where appropriate			
Competency D1: Client focus  Sub-competency D1.1 Scoping client requirements	D1.1.3	Engages the client in outlining selecting from applicable options, and taking ownership of the structure and execution of the assignment (this is expected for both the development and independence levels)	Advises, coaches and mentors others in the design of projects	
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the "Independence" level?</b></p> <p>Evidence (through proposals, notes, etc.) of the consultant's role in guiding the development of options for what and how the work of the engagement will be performed. Documentation should include agreement from client and consultant on criteria for assignment completion (i.e., clear understanding of scope limits), timelines/schedules, and agreed upon resources from both parties.</p>				

		Range Statements		
COMPETENCE CLASS D	Competence Class Name: Engagement Management	At the Development level, for THIS sub competency	At the Independence level, for THIS sub competency	At the Profession Leader level, for THIS sub competency
	Competence Class Description: Determines the scope of client assignments. Manages client and other stakeholders' expectations. Engages expertise of others where appropriate			
Competency D1: Client focus	D1.2.1	Understands and operates within contractual terms of engagement	Manages client, and others stakeholder, expectations;	Utilizes knowledge of external issues and depth of experience to inform, challenge and define scope of work and expected timelines
Sub-competency D1.2 Managing client interface		Complies with contractual terms; Conducts regular assignment reviews with client; Communicates the assignment process effectively to clients and makes timely reports to discuss with clients the need to change purpose, scope or progress of the assignment if evidence indicates the necessity		
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the "Independence" level?</b>  <b>NOTE: for this sub-competency, the specific activities noted around contractual terms etc. are not articulated differently at levels above or below "independent". It is expected that all consultants should be able to perform at the independent level.</b></p> <p>Evidence, via reports, engagement notes, etc. of active management of the relationship and communication with the client. Consultants must be able to exercise professional judgement to adjust scope dynamically as the engagement evolves, but such changes must be documented with consultant and client agreement. Documentation could include formal change orders, progress reports, or briefing notes/memos explaining the rationale for and approval of the change. Evidence presented will indicate that the consultant has, applies and can articulate a clear and logical process throughout the engagement to ensure that issues impacting scope, schedule, deliverables are effectively managed.</p>				

		Range Statements		
<b>COMPETENCE CLASS D</b>	<b>Competence Class Name: Engagement Management</b>	<b>At the Development level, for THIS sub competency</b>	<b>At the Independence level, for THIS sub competency</b>	<b>At the Profession Leader level, for THIS sub competency</b>
	<b>Competence Class Description: Determines the scope of client assignments. Manages client and other stakeholders' expectations. Engages expertise of others where appropriate</b>			
<b>Competency D1: Client focus</b>	<b>D1.3.1</b>	Develops network to support and add value to client engagements, including within own company, clients and external professional networks	Understands when expertise of others is needed alongside own and agrees with client on engagement and management of external resources, including taking full responsibility where applicable.	Leverages effective, established networks to create added value for clients
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the "Independence" level?</b></p> <p>Consultants must demonstrate their ability to use professional judgement in integrating additional/outside expertise. Such cases must be properly documented, via consultants' notes, briefing memos, change orders, progress reports, etc., with appropriate client sign off. Evidence presented will indicate that the consultant has and applies a process to evaluate when additional expertise is required, and how these external resources are engaged either by the client directly or via the consultant. Consultant will be able to articulate a clear and logical method for managing external expertise, including ensuring that external resources (if they are under the management of the consultant) are adhering to the Code of Professional Conduct throughout the assignment. Processes may also include provisions for seeking outside legal or other professional advice when situations warrant such action.</p>				

		Range Statements		
<b>COMPETENCE CLASS D</b>	<b>Competence Class Name:</b> Engagement Management	<b>At the Development level, for THIS sub competency</b>	<b>At the Independence level, for THIS sub competency</b>	<b>At the Profession Leader level, for THIS sub competency</b>
	<b>Competence Class Description:</b> Determines the scope of client assignments. Manages client and other stakeholders' expectations. Engages expertise of others where appropriate			
<b>Competency D1: Client focus</b>	<b>D1.3.2</b>	Develops network to support and add value to client engagements, including within own company, clients and external professional networks	Leverages network effectively to research and define client issues, generate innovative solutions for clients and/or inform the delivery solution	Leverages effective, established networks to create added value for clients
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the "Independence" level?</b></p> <p>Consultant will be able to describe situations where they have used their professional judgement to engage their network for client benefit, either formally or informally. This could range from informal engagement of their network for specific expertise or advice applicable to a client issue, to formal teaming agreements, joint-ventures or other contracting arrangements. In any case, the consultant will ensure that client confidentiality is maintained, and that the legal limits of confidentiality are fully understood, through the use of non-disclosure agreements (NDAs) and other legal vehicles as appropriate.</p>				

## Competence D2: Assignment Management

		Range Statements		
COMPETENCE CLASS D	Competence Class Name: Engagement Management	At the Development level, for THIS sub competency	At the Independence level, for THIS sub competency	At the Profession Leader level, for THIS sub competency
	Competence Class Description: Determines the scope of client assignments. Manages client and other stakeholders' expectations. Engages expertise of others where appropriate			
<b>Competency D2: Assignment Management: Manages client assignments effectively, delivers timely solutions while balancing priorities and managing time effectively</b>  <b>Sub-competency D2.1 Managing successful outcomes</b>	D2.1.1	Manages own delivery in a consulting engagement under the guidance of more experienced colleagues	Manages client assignments successfully, ensuring that objectives, deadlines and budgets are agreed and delivered on time	Leads major projects involving consulting teams and advises others on objectives, design and implementation
<b>Evidence of Competent Practice:</b> <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the "Independence" level?</b>  Can demonstrate and articulate a process for effectively allocating resources to projects to ensure timely completion. Can demonstrate instances where resources were reallocated during projects to ensure schedules were maintained. Can articulate a process for dealing with issues impacting scope, schedule, deliverables and/or costs. This could include process manuals, templates, guides, resource library for associates, etc. that are used to manage consulting teams, where applicable. Consultant will be able to articulate a process for on-going mentoring and training of team members during assignments.				

		Range Statements		
COMPETENCE CLASS D	Competence Class Name: Engagement Management	At the Development level, for THIS sub competency	At the Independence level, for THIS sub competency	At the Profession Leader level, for THIS sub competency
	Competence Class Description: Determines the scope of client assignments. Manages client and other stakeholders' expectations. Engages expertise of others where appropriate			
Competency D2: Assignment Management: Manages client assignments effectively, delivers timely solutions while balancing priorities and managing time effectively	D2.2.1	Plans and manages own time ensuring own deliverables are completed to required timescales and budget	Demonstrates competent use of planning tools and techniques, and sets milestones appropriate for the size and scale of the assignment	Reviews and advises on project plans, building contingency and risk mitigation plans for large and complex assignments
Sub-competency D2.2 Planning				
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the "Independence" level?</b></p> <p>Demonstrates the use of an effective process for planning engagements and balancing resources which may include multiple concurrent activities, either on a single project or between multiple projects. The consultant can show how resources are balanced/reallocated as engagements progress, in order to maintain schedules and quality of deliverables. Evidence could include documented plans, resource management tools, project management processes/practices.</p>				



		Range Statements		
COMPETENCE CLASS D	Competence Class Name: Engagement Management	At the Development level, for THIS sub competency	At the Independence level, for THIS sub competency	At the Profession Leader level, for THIS sub competency
	Competence Class Description: Determines the scope of client assignments. Manages client and other stakeholders' expectations. Engages expertise of others where appropriate			
Competency D2: Assignment Management: Manages client assignments effectively, delivers timely solutions while balancing priorities and managing time effectively	D2.3.1	Learns to handle changes in project scope and seeks advice from more experienced consultants when necessary	Shows flexibility and adaptability to changing demands and deadlines. Demonstrates ability to manage ambiguity	Takes responsibility for the people working for them in a project and provides guidance on how to react to changes in the assignment. Reviews and advises on project management to ensure flexibility
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the "Independence" level?</b></p> <p>Consultant will be able to articulate how they balance priorities and resources across multiple concurrent projects, how they have adjusted same to maintain schedule. Shows a clear understanding of how to deal with uncertainty/ambiguity in different phases of a project, and has a process for effectively managing the unknowns and their associated risks so they do not compromise schedule, deliverables or costs.</p>				

		Range Statements		
COMPETENCE CLASS D	Competence Class Name: Engagement Management	At the Development level, for THIS sub competency	At the Independence level, for THIS sub competency	At the Profession Leader level, for THIS sub competency
	Competence Class Description: Determines the scope of client assignments. Manages client and other stakeholders' expectations. Engages expertise of others where appropriate			
Competency D2: Assignment Management: Manages client assignments effectively, delivers timely solutions while balancing priorities and managing time effectively  Sub-competency D2.3 Managing the assignment	D2.3.2	Persists with own tasks, seeking advice from more experienced consultants when necessary	Keeps 'big picture' in focus but addresses detail and balances priorities	Reviews and advises on project management to ensure priorities and maintained and the assignment stays 'on track'
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the "Independence" level?</b></p> <p>Demonstrates (through engagement notes, reports, engagement summaries, etc.) the ability to adjust and optimize their focus through an assignment from detail to general and back to ensure overall project objectives are achieved. Can articulate how they can retain context and proportionality in dealing with detail as well as big-picture issues while managing assignments. Maintains ongoing digital and/or manual files with progress notes.</p>				

		Range Statements		
COMPETENCE CLASS D	Competence Class Name: Engagement Management	At the Development level, for THIS sub competency	At the Independence level, for THIS sub competency	At the Profession Leader level, for THIS sub competency
	Competence Class Description: Determines the scope of client assignments. Manages client and other stakeholders' expectations. Engages expertise of others where appropriate			
Competency D2: Assignment Management: Manages client assignments effectively, delivers timely solutions while balancing priorities and managing time effectively	D2.3.3	Develops awareness of priorities and time management capability	Manages own time effectively to meet deadlines	Advises, coaches and mentors others in techniques for setting priorities and time management
Sub-competency D2.3 Managing the assignment				
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the "Independence" level?</b></p> <p>Consultant will be able to articulate a process for allocating and balancing their time across multiple activities, multiple projects, and multiple priorities; evidence that they have done so to meet critical deadlines on projects will be found in engagement summaries, project notes, and/or client or colleague attestations. Evidence will clearly demonstrate a professional approach to managing and optimizing time.</p>				

		Range Statements		
COMPETENCE CLASS D	Competence Class Name: Engagement Management	At the Development level, for THIS sub competency	At the Independence level, for THIS sub competency	At the Profession Leader level, for THIS sub competency
	Competence Class Description: Determines the scope of client assignments. Manages client and other stakeholders' expectations. Engages expertise of others where appropriate			
<b>Competency D2: Assignment Management: Manages client assignments effectively, delivers timely solutions while balancing priorities and managing time effectively</b>  <b>Sub-competency D2.3 Managing the assignment</b>	<b>D2.3.4</b>	Works with others to develop mutually supportive relationships. Contributes to positive team working behaviours	Where appropriate, demonstrates the ability to identify, develop, describe and allocate work streams for others to meet objectives, deadlines and budgets	Draws on a range of leadership styles to ensure effective development of others. Proactively coaches and develops others. Manages complex teams operating across cross-cultural boundaries
<b>Evidence of Competent Practice:</b> <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the "Independence" level?</b>  Consultant will demonstrate, through engagement summaries, project notes, client/colleague attestations etc. that they know when to allocate/delegate work to others. They will have a process for delegating, an understanding of what can be delegated, and for evaluating skills/capacity of others such that work can be assigned in a manner that does not compromise quality, schedule or cost.				

		Range Statements		
COMPETENCE CLASS D	Competence Class Name: Engagement Management	At the Development level, for THIS sub competency	At the Independence level, for THIS sub competency	At the Profession Leader level, for THIS sub competency
	Competence Class Description: Determines the scope of client assignments. Manages client and other stakeholders' expectations. Engages expertise of others where appropriate			
Competency D2: Assignment Management: Manages client assignments effectively, delivers timely solutions while balancing priorities and managing time effectively	D2.4.1	Works in one or more stages of project delivery	Operates competently in all areas of project delivery from offering through to closure	Takes responsibility for the people working for them in a project and ensures that they have the required competencies
Sub-competency D2.4 Working on all phases of project				
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the "Independence" level?</b></p> <p>Can demonstrate, through engagement summaries, project notes and similar, how they have been involved in all phases of the client assignment. Involvement may be independent, or may involve collaborating as part of a team (in which case it should be clear what their involvement was on specific aspects of the project), or supervising/approving the work of others. It is not necessary to be involved in all phases of all projects, but sufficient evidence must be presented of involvement in, and a clear understanding of, the work in all phases.</p>				

		Range Statements		
COMPETENCE CLASS D	Competence Class Name: Engagement Management	At the Development level, for THIS sub competency	At the Independence level, for THIS sub competency	At the Profession Leader level, for THIS sub competency
	Competence Class Description: Determines the scope of client assignments. Manages client and other stakeholders' expectations. Engages expertise of others where appropriate			
Competency D2: Assignment Management: Manages client assignments effectively, delivers timely solutions while balancing priorities and managing time effectively  Sub-competency D2.5 Managing handover to client	D2.5.1	Completes own deliverables and engages client to take ownership. Shows the ability to draw to a close own deliverables. Understands the need for client withdrawal based on the progress to date indicating that this can be necessary	Anticipates handover issues and addresses them during projects. Agrees handover process with client (e.g. skills transfer, implementation, sustainability, knowledge documentation). If withdrawing because the consultant cannot complete the project, offers the client recommendations on other resources that can complete the project	Responsible and accountable that the consulting team completes all outputs and deliverables. Follows up periodically with client
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the "Independence" level?</b></p> <p>Can demonstrate a thorough understanding of, and a process for accomplishing, all elements of the handover to the client, to ensure that contractual and ethical and professional requirements are fulfilled. Has a process for closing out work on projects before completion, where circumstances dictate this is appropriate - and can articulate how they make those determinations in a clear and logical process.</p>				

## Competence D3: Consulting Knowledge

		Range Statements		
COMPETENCE CLASS D	Competence Class Name: Engagement Management	At the Development level, for THIS sub competency	At the Independence level, for THIS sub competency	At the Profession Leader level, for THIS sub competency
	Competence Class Description: Determines the scope of client assignments. Manages client and other stakeholders' expectations. Engages expertise of others where appropriate			
Competency D3: Consulting Knowledge Captures, shares and applies knowledge in a structured way relevant to the engagement needs	D3.1.1	Builds knowledge of logical processes for data gathering and analysis	Gathers, records and analyzes data and information through ordered and logical processes and translates data into useable output	Advises, coaches and mentors others in techniques for data gathering and analysis
Sub-competency D3.1 Using a logical process approach to capturing and building knowledge				
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the "Independence" level?</b></p> <p>Consultant will articulate a process and rationale for efficient and effective data gathering; produces notes, analysis, conclusions from data gathering; they can describe alternative approaches and situations where these would be appropriate (and why).</p>				

		Range Statements		
COMPETENCE CLASS D	Competence Class Name: Engagement Management	At the Development level, for THIS sub competency	At the Independence level, for THIS sub competency	At the Profession Leader level, for THIS sub competency
	Competence Class Description: Determines the scope of client assignments. Manages client and other stakeholders' expectations. Engages expertise of others where appropriate			
Competency D3: Consulting Knowledge Captures, shares and applies knowledge in a structured way relevant to the engagement needs  Sub-competency D3.2 Sharing knowledge and experiences with others	D3.2.1	In assignments uses own knowledge to contribute within a project team	Shares acquired knowledge and experience with others in appropriate ways in order to build value for the client	Advises, coaches and mentors others in effective communication methods
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the "Independence" level?</b></p> <p>Evidence of reports, presentations, action plans that can be actioned by clients. Can articulate why particular approaches to client reporting are taken, when alternate approaches would be more appropriate, and why.</p>				



		Range Statements		
COMPETENCE CLASS D	Competence Class Name: Engagement Management	At the Development level, for THIS sub competency	At the Independence level, for THIS sub competency	At the Profession Leader level, for THIS sub competency
	Competence Class Description: Determines the scope of client assignments. Manages client and other stakeholders' expectations. Engages expertise of others where appropriate			
<p><b>Competency D3: Consulting Knowledge Captures, shares and applies knowledge in a structured way relevant to the engagement needs</b></p> <p><b>Sub-competency D3.3 Applying knowledge, tools and technical expertise to create value for the client</b></p>	<b>D3.3.1</b>	Develops knowledge of appropriate tools and techniques	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	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
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the "Independence" level?</b></p> <p>Client interviews (conducted by Institutes) or documented client attestations will demonstrate the value provided.</p>				

## Competence D4: Consulting Process Techniques

		Range Statements		
COMPETENCE CLASS D	Competence Class Name: Engagement Management	At the Development level, for THIS sub competency	At the Independence level, for THIS sub competency	At the Profession Leader level, for THIS sub competency
	Competence Class Description: Determines the scope of client assignments. Manages client and other stakeholders' expectations. Engages expertise of others where appropriate			
Competency D4: Consulting Process Techniques- Uses a range of techniques, including facilitation, coaching and mentoring to deliver solutions of mutual benefit  Sub-competency D4.1 Presentation	D4.1.1	Presents ideas effectively one to one or in small groups adapting style to audience	Uses presentation tools and techniques effectively	Draws on a range of experiences and techniques to adapt communication style to challenging situations and audiences
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the "Independence" level?</b></p> <p>Effective presentation skills will be demonstrated during the structured interview. Clear and compelling communication processes, articulation of their processes, their results, their recommendations, and how they have influenced client action through their presentations. Video of presentations/speaking assignments would also be appropriate, as would client attestations (via client interviews) to demonstrate consultant proficiency in this sub-competency.</p>				

		Range Statements		
COMPETENCE CLASS D	Competence Class Name: Engagement Management	At the Development level, for THIS sub competency	At the Independence level, for THIS sub competency	At the Profession Leader level, for THIS sub competency
	Competence Class Description: Determines the scope of client assignments. Manages client and other stakeholders' expectations. Engages expertise of others where appropriate			
Competency D4: Consulting Process Techniques- Uses a range of techniques, including facilitation, coaching and mentoring to deliver solutions of mutual benefit	D4.2.1	Displays use of appropriate business language and grammar	Produces clear client correspondence and reports selecting most appropriate style to achieve desired outcome	Writes in a style appropriate to the audience across cultures
Sub-competency D4.2 Written reports				
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the "Independence" level?</b></p> <p>Written client reports, proposals, etc. will be clear, concise, and will provide compelling evidence for appropriate actions/next steps. Client attestations (via client interviews) will also demonstrate consultant proficiency in this sub-competency.</p>				

		Range Statements		
COMPETENCE CLASS D	Competence Class Name: Engagement Management	At the Development level, for THIS sub competency	At the Independence level, for THIS sub competency	At the Profession Leader level, for THIS sub competency
	Competence Class Description: Determines the scope of client assignments. Manages client and other stakeholders' expectations. Engages expertise of others where appropriate			
Competency D4: Consulting Process Techniques- Uses a range of techniques, including facilitation, coaching and mentoring to deliver solutions of mutual benefit	D4.3.1	Develops facilitation skills and leading group sessions under supervision	Manages group processes to achieve desired outcomes, using facilitation tools and techniques to maximize the group's decision-making potential	Advises, coaches and mentors others in facilitation techniques
Sub-competency D4.3 Facilitation				
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the "Independence" level?</b></p> <p>Consultant will articulate a process/approach for facilitation that demonstrates their ability to balance control, open communication and participant engagement to produce required information and effective decisions and actions. Client attestations (via client interviews) will also demonstrate consultant proficiency in this sub-competency.</p>				

		Range Statements		
COMPETENCE CLASS D	Competence Class Name: Engagement Management	At the Development level, for THIS sub competency	At the Independence level, for THIS sub competency	At the Profession Leader level, for THIS sub competency
	Competence Class Description: Determines the scope of client assignments. Manages client and other stakeholders' expectations. Engages expertise of others where appropriate			
Competency D4: Consulting Process Techniques- Uses a range of techniques, including facilitation, coaching and mentoring to deliver solutions of mutual benefit  Sub-competency D4.4 Coaching	D4.4.1	Develops knowledge and understanding of the variety of coaching styles, skills and techniques	Where appropriate, demonstrates use of a process to enable client learning and development to occur and performance to improve. Demonstrates knowledge and understanding of the variety of styles, skills and techniques that are appropriate to the context in which the coaching takes place	Advises, coaches others in coaching techniques and their application in differing contexts
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the "Independence" level?</b></p> <p>Consultant can articulate multiple approaches to coaching, and explain why/when they are appropriate. Engagement summaries should illustrate instances of coaching (client, other consultants) to achieve results. Client attestations (via client interviews) or attestations from colleagues may also demonstrate consultant proficiency in this sub-competency.</p>				

		Range Statements			
COMPETENCE CLASS D	Competence Class Name: Engagement Management	At the Development level, for THIS sub competency	At the Independence level, for THIS sub competency	At the Profession Leader level, for THIS sub competency	
	Competence Class Description: Determines the scope of client assignments. Manages client and other stakeholders' expectations. Engages expertise of others where appropriate				
<b>Competency D4: Consulting Process Techniques- Uses a range of techniques, including facilitation, coaching and mentoring to deliver solutions of mutual benefit</b>  <b>Sub-competency D4.5 Mentoring</b>		D4.5.1	Develops knowledge and understanding of the variety of mentoring styles, skills and techniques	Where appropriate, demonstrates how personal knowledge and experience has been passed on to help client personnel make significant transitions in knowledge, work or thinking in order to aid their personal development	Advises and mentors others in mentoring and its application in differing contexts
<b>Evidence of Competent Practice:</b> <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the "Independence" level?</b>  Consultant can articulate multiple approaches to mentoring, and why/when they are appropriate. Engagement summaries should illustrate instances of how personal knowledge/experience has been passed on to help client personnel or other consultants achieve desired results. Client attestations (via client interviews) and/or colleague attestations will also demonstrate consultant proficiency in this sub-competency.					

		Range Statements		
COMPETENCE CLASS D	Competence Class Name: Engagement Management	At the Development level, for THIS sub competency	At the Independence level, for THIS sub competency	At the Profession Leader level, for THIS sub competency
	Competence Class Description: Determines the scope of client assignments. Manages client and other stakeholders' expectations. Engages expertise of others where appropriate			
Competency D4: Consulting Process Techniques- Uses a range of techniques, including facilitation, coaching and mentoring to deliver solutions of mutual benefit  Sub-competency D4.6 Consensus building	D4.6.1	Develops skills in building consensus and resolving conflict	Demonstrates skills in building consensus and managing conflict	Advises, coaches and mentors others in techniques of consensus building and conflict management
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the "Independence" level?</b></p> <p>Documentation (through notes, engagement summaries, etc.) of the consultant's knowledge and application of conflict management and consensus building techniques, and how they have been applied in client engagements. Verification/confirmation should be sought through client interviews/attestations.</p>				

		Range Statements		
COMPETENCE CLASS D	Competence Class Name: Engagement Management	At the Development level, for THIS sub competency	At the Independence level, for THIS sub competency	At the Profession Leader level, for THIS sub competency
	Competence Class Description: Determines the scope of client assignments. Manages client and other stakeholders' expectations. Engages expertise of others where appropriate			
Competency D4: Consulting Process Techniques- Uses a range of techniques, including facilitation, coaching and mentoring to deliver solutions of mutual benefit	D4.7.1	Develops team working skills	Works effectively in a team with others and seeks support from others if appropriate	Leads teams of people and coaches people in team-working skills
Sub-competency D4.7 Collaborative working				
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the "Independence" level?</b></p> <p>Documentation, through consultant's notes/project notes/engagement summaries, of effective participation in team-based consulting, including how advice from others has been accessed. The consultant should clearly demonstrate skills in communication, group problem solving/decision making, and methods for gaining consensus that are appropriate to the type of engagements conducted. Verification/confirmation should also be sought through client interviews/attestations.</p>				



		Range Statements		
COMPETENCE CLASS D	Competence Class Name: Engagement Management	At the Development level, for THIS sub competency	At the Independence level, for THIS sub competency	At the Profession Leader level, for THIS sub competency
	Competence Class Description: Determines the scope of client assignments. Manages client and other stakeholders' expectations. Engages expertise of others where appropriate			
Competency D4: Consulting Process Techniques- Uses a range of techniques, including facilitation, coaching and mentoring to deliver solutions of mutual benefit	D4.7.2	Learns management techniques	Demonstrates, if in a management role, the management, development and appraisal of others and delegation of tasks	Demonstrates the management, development and appraisal of others and delegation of tasks
Sub-competency D4.7 Collaborative working				
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the "Independence" level?</b></p> <p>Note: this may not be evident for an individual who is NOT in a management role.</p> <p>Evidence should demonstrate the ability of a consultant (1) to be managed within a larger consulting team, and (2) to manage upwards (providing appropriate, ethical and timely feedback to those who need to know it) as part of an overall collaborative working skillset. Candidate will be able to articulate how they determine team members' strengths, capabilities, desires, and how they use that knowledge to assign work that grows subordinate skills without sacrificing client value. Project plans/notes can be used to illustrate processes used. Verification/confirmation should also be sought through client interviews/attestations.</p>				

## Competence D5: Tools and Methodologies

		Range Statements		
<b>COMPETENCE CLASS D</b>	<b>Competence Class Name: Engagement Management</b>	<b>At the Development level, for THIS sub competency</b>	<b>At the Independence level, for THIS sub competency</b>	<b>At the Profession Leader level, for THIS sub competency</b>
	<b>Competence Class Description: Determines the scope of client assignments. Manages client and other stakeholders' expectations. Engages expertise of others where appropriate</b>			
<b>Competency D5: Tools and methodologies- Selects and uses appropriate tools and methodologies</b>	<b>D5.1.1</b>	Develops knowledge of appropriate tools and techniques	Evaluates tools and techniques against validity criteria and uses them to obtain best data, information or knowledge available, within budgetary or organizational constraints	Advises on use of a range of diagnostic tools, methods and techniques. Makes a holistic assessment using information and knowledge from tools and techniques and from market experience
<b>Sub-competency D5.1 Selects and uses appropriate diagnostic tools, methods and techniques</b>				
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the "Independence" level?</b></p> <p>Consultant will be able to document the tools used in different types of engagements, and explain why they are appropriate, as well as what other options were considered. Engagement checklists/steps with notes and procedures underlining the selection of appropriate tools or processes may be presented. Evidence should reflect professional judgement in selecting appropriately from an array of tools and techniques that they can apply to maximize value for the client. Verification/confirmation should also be sought through client interviews/attestations (i.e., did the consultant review alternative tools and approaches with client, etc.).</p>				

		Range Statements		
COMPETENCE CLASS D	Competence Class Name: Engagement Management	At the Development level, for THIS sub competency	At the Independence level, for THIS sub competency	At the Profession Leader level, for THIS sub competency
	Competence Class Description: Determines the scope of client assignments. Manages client and other stakeholders' expectations. Engages expertise of others where appropriate			
Competency D5: Tools and methodologies- Selects and uses appropriate tools and methodologies  Sub-competency D5.1 Selects and uses appropriate diagnostic tools, methods and techniques	D5.1.2	Tests client hypotheses and solutions with robust data	Uses a variety of data gathering, problem solving and analytical techniques that take into account client and own values and objectives and the type of recommendations to be made	Develops and selects appropriate methods in unclear situations
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the "Independence" level?</b></p> <p>Consultant will be able to document different analytical tools/methods used, in different types of engagements, and explain why they are appropriate, what other options were considered, and how those tools/methods take into account client and own values and objectives and the type of recommendations to be made. Engagement checklists/steps with notes and procedures underlining the selection of appropriate tools or processes may be presented. Evidence should reflect professional judgement in selecting appropriately from an array of tools and techniques that they can apply to maximize value for the client. Verification/confirmation should also be sought through client interviews/attestations (i.e., did the consultant review alternative tools and approaches with client, etc.).</p>				

## Competence D6: Risk and Quality Management

		Range Statements		
COMPETENCE CLASS D	Competence Class Name: Engagement Management	At the Development level, for THIS sub competency	At the Independence level, for THIS sub competency	At the Profession Leader level, for THIS sub competency
	Competence Class Description: Determines the scope of client assignments. Manages client and other stakeholders' expectations. Engages expertise of others where appropriate			
Competency 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	D6.1.1	Manages 'low risk' projects (low complexity, acting as sole consultant)	Analyzes risk in an engagement including, where appropriate, risk identification and evaluation (probability and impact assessment) and identifies suitable responses to risk (prevent, reduce, transfer, accept, contingency)	Manages 'high risk' projects (major clients, multidisciplinary teams, complex and ambiguous scope of work, significant change to cash flow, capital funding, business design, market approach and profitability, sustainability, or stakeholder approval)
Sub-competency D6.1 Managing risk and issues				
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the "Independence" level?</b></p> <p>Evidence can include risk matrices from proposals, and/or specific risk management correspondence with clients. Is there evidence of a full consideration for risks (specific to project, as well as in the overall context of the client environment) and should include consideration of the risks associated with achieving the identified client objectives, expectations and priorities for the assignment. Where risks are evident, risk management and contingency plans will be developed. Verification/confirmation should also be sought through client interviews/attestations (i.e., did the consultant review risk and risk management approaches with client, etc.).</p>				

		Range Statements		
COMPETENCE CLASS D	Competence Class Name: Engagement Management	At the Development level, for THIS sub competency	At the Independence level, for THIS sub competency	At the Profession Leader level, for THIS sub competency
	Competence Class Description: Determines the scope of client assignments. Manages client and other stakeholders' expectations. Engages expertise of others where appropriate			
Competency 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	D6.1.2	Pro-actively identifies and communicates issues impacting progress of own work and that of client. Requests advice in achieving milestones	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	Manages 'high risk' projects (major clients, multidisciplinary teams, complex and ambiguous scope of work, significant change to cash flow, capital funding, business design, market approach and profitability, sustainability, or stakeholder approval)
Sub-competency D6.1 Managing risk and issues				
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the "Independence" level?</b></p> <p>Evidence should include documentation to show that risk plans from proposals, project charters, project plans are being followed as part of practice. Where issues have arisen, are contingency plans in place and are they followed? How has the impact been minimized? Verification/confirmation should also be sought through client interviews/attestations (i.e., did the consultant review risk and risk management approaches with client, etc.).</p>				

		Range Statements		
<b>COMPETENCE CLASS D</b>	<b>Competence Class Name: Engagement Management</b>	<b>At the Development level, for THIS sub competency</b>	<b>At the Independence level, for THIS sub competency</b>	<b>At the Profession Leader level, for THIS sub competency</b>
	<b>Competence Class Description: Determines the scope of client assignments. Manages client and other stakeholders' expectations. Engages expertise of others where appropriate</b>			
<b>Competency 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</b>	<b>D6.2.1</b>	Understands basic quality concepts: working to specification, cost of quality. Complies with consultant team quality management processes and standards, and agreed with the client	Identifies success criteria to ensure required quality of deliverables is achieved	Contributes to the development of quality management within the profession and takes responsibility for the quality of work done by those who work for them
<b>Sub-competency D6.2 Managing quality</b>				
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the "Independence" level?</b></p> <p>Consultant will provide documentation (from project plans/charters, notes, reports) of processes in place to ensure quality through the project. The quality management approach should reflect how it is integrated into the overall assignment and the client's reporting processes and priorities. This can include specific quality assurance steps and management processes to ensure work (particularly for others on the team) meets quality requirements. Verification/confirmation should also be sought through client interviews/attestations.</p>				

		Range Statements		
COMPETENCE CLASS D	Competence Class Name: Engagement Management	At the Development level, for THIS sub competency	At the Independence level, for THIS sub competency	At the Profession Leader level, for THIS sub competency
	Competence Class Description: Determines the scope of client assignments. Manages client and other stakeholders' expectations. Engages expertise of others where appropriate			
Competency 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  Sub-competency D6.2 Managing quality	D6.2.2	Seeks feedback and acts on it	Assures quality compliance of own deliverables and, where appropriate, those of the consultancy team	Leads quality assurance reviews to include evidence-based decision-making, including direct checks with clients
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the "Independence" level?</b></p> <p>Consultant will provide documentation (from project plans/charters, notes, reports) of processes used to ensure quality, and evidence that they are being used on projects. This can include specific quality assurance steps, management processes to ensure work (particularly for others on the team) meets quality requirements. Verification/confirmation should also be sought through client interviews/attestations.</p>				

		Range Statements		
COMPETENCE CLASS D	Competence Class Name: Engagement Management	At the Development level, for THIS sub competency	At the Independence level, for THIS sub competency	At the Profession Leader level, for THIS sub competency
	Competence Class Description: Determines the scope of client assignments. Manages client and other stakeholders' expectations. Engages expertise of others where appropriate			
Competency 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	D6.2.3	Builds track record of successful delivery in a range of support roles in client engagements	Monitors and measures client satisfaction	Advises others on design of quality assurance process
Sub-competency D6.2 Managing quality				
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the "Independence" level?</b></p> <p>Consultant will provide documentation showing that processes are followed to support the on-going measurement and adjustment of projects to meet client requirements and to ensure client satisfaction. Verification/confirmation should also be sought through client interviews/attestations.</p>				



## COMPETENCE CLASS E: ETHICS AND PROFESSIONALISM

CMCs must act ethically, in accordance with the Uniform Code of Professional Conduct and applicable statutes and regulations.

		Range Statements		
COMPETENCE CLASS E	Competence Class Name: Ethics and Professionalism	At the Development level, for THIS sub competency	At the Independence level, for THIS sub competency	At the Profession Leader level, for THIS sub competency
	Competence Class Description: 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			
Competency E1: Demonstrating ethical behaviour	E1.1	Demonstrates appropriate ethical behaviour and adheres to the CMC-Canada Uniform Code of Professional Conduct	Demonstrates appropriate ethical behaviour and adheres to the CMC-Canada Uniform Code of Professional Conduct	Acts as a role model for ethical behaviour and contributes to the development and maintenance of ethical standards within the profession
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the “Independence” level?</b></p> <p>Consultant will have a) passed the CMC Ethics Exam, b) articulate a formal approach or written policy for recognizing, declaring and dealing with, potential ethical issues that can arise at each stage of the consulting assignment, including conflict of interest, confidentiality, and legal issues.</p> <p>Scenarios, which the consultant can respond to on a hypothetical basis, may be used to determine competent practice.</p>				

		Range Statements		
COMPETENCE CLASS E	Competence Class Name: Ethics and Professionalism	At the Development level, for THIS sub competency	At the Independence level, for THIS sub competency	At the Profession Leader level, for THIS sub competency
	Competence Class Description: 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			
Competency E2: Demonstrating professional behaviour	E2.1	Is able to identify client's needs and is developing the ability to provide advice to meet those needs	Ensures professional advice is sound and relevant to client's needs	Guides others within the profession in the ways of identifying client needs and how to provide sound and relevant advice
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the "Independence" level?</b></p> <p>Through engagement summaries, can illustrate how their advice is sound and relevant to client's needs and is independent of any personal financial/commercial interests. Consultant must illustrate how they make clients aware of the limitations of their professional services, and when to seek additional advice/assistance outside of the consultant's expertise.</p> <p>Scenarios can be used to allow consultants to detail this aspect on a hypothetical basis. Client interviews/attestations can provide examples and/or support.</p> <p>Consultant will also demonstrate awareness of and compliance with specific legal/regulatory/professional requirements pertinent to their area of expertise (e.g., FINTRAC and money laundering procedures for financial consulting).</p>				

		Range Statements		
COMPETENCE CLASS E	Competence Class Name: Ethics and Professionalism	At the Development level, for THIS sub competency	At the Independence level, for THIS sub competency	At the Profession Leader level, for THIS sub competency
	Competence Class Description: 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			
Competency E2: Demonstrating professional behaviour	E2.2	Sets high personal standards, acts with integrity, respects confidentiality, and is courteous, reliable and responsive in dealing with others (applicable to both the Developmental and Independence levels)	Acts as a role model in demonstrating high personal standards of integrity and confidentiality	
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the “Independence” level?</b></p> <p>Client interviews and attestations/testimonials will demonstrate this competency or engagement summaries documenting the impact on management of the assignment of adherence to high personal standards, acting with integrity, respecting confidentiality, or being courteous, reliable and responsive in dealing with others.</p>				

		Range Statements		
COMPETENCE CLASS E	Competence Class Name: Ethics and Professionalism	At the Development level, for THIS sub competency	At the Independence level, for THIS sub competency	At the Profession Leader level, for THIS sub competency
	Competence Class Description: 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			
Competency E2: Demonstrating professional behaviour	E2.3	Understands diversity in the context of consultancy and is developing ways to manage it	Understands and manages diversity in terms of culture, religion, race, gender, physical/mental capabilities, etc.	Acts as a role model in managing diversity and coaches others to help their understanding
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the “Independence” level?</b></p> <p>Consultant will be able to articulate their approach regarding diversity and inclusion, which they may elaborate upon with specific examples from engagements or with client attestations/testimonials. Scenarios may be used to allow consultants to detail this aspect on a hypothetical basis, where specific instances are not readily available.</p>				

		Range Statements		
COMPETENCE CLASS E	Competence Class Name: Ethics and Professionalism	At the Development level, for THIS sub competency	At the Independence level, for THIS sub competency	At the Profession Leader level, for THIS sub competency
	Competence Class Description: 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			
Competency E2: Demonstrating professional behaviour	E2.4	Develops professional behaviour and is assessing the reactions of colleagues to that behaviour	Demonstrates behaviour that earns the respect of professional colleagues	Is held in high regard by senior members of the profession and is approached by others for professional advice
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the “Independence” level?</b></p> <p>Verifiable attestations from CMC sponsors, mentors, and colleagues can provide evidence of professional practice.</p>				

		Range Statements		
COMPETENCE CLASS E	Competence Class Name: Ethics and Professionalism	At the Development level, for THIS sub competency	At the Independence level, for THIS sub competency	At the Profession Leader level, for THIS sub competency
	Competence Class Description: 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			
Competency E2: Demonstrating professional behaviour	E2.5	NOTE: SAME FOR ALL LEVELS Applies professional and ethical criteria and withdraws from an engagement that discovers, or causes, illegal activity		
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the “Independence” level?</b></p> <p>Through engagement summaries, consultant can illustrate how professional and ethical criteria were applied and incidences, if any, where Consultant chose to withdraw from an engagement because of the discovery, of illegal/unethical activity.</p>				

## COMPETENCE CLASS F: Analytical Skills

CMCs must possess high-level analytical and problem-solving abilities in order to deliver professional value to their clients.

		Range Statements		
COMPETENCE CLASS F	Competence Class Name: Analytical Skills	At the Development level, for THIS sub competency	At the Independence level, for THIS sub competency	At the Profession Leader level, for THIS sub competency
	Competence Class Description: Applies analytical and proactive thinking to ensure robust and appropriate client solutions			
Competency F1: Problem Solving	F1.1	Understands problem-solving techniques and practices their application. Observes behaviour of senior consultants in challenging assumptions and probing details	Uses a logical, coherent and consistent approach to problem-solving. Challenges assumptions and probes details	Provides advice, coaches and mentors others in problem-solving techniques and actively encourages attitudes that challenge assumptions. Understands that problem solving techniques, analytic and other tools are a means of working in a “conversation” with the client and not an end in themselves
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the “Independence” level?</b></p> <p>Engagement summaries, project notes, project reports will demonstrate consultant’s problem solving ability, consideration of alternatives, and the logical approach followed to diagnose and prescribe. Where appropriate, client sign off should be evident. Evidence will provide sufficient detail to show multiple/alternative problem solving approaches tailored to project requirements.</p>				

		Range Statements		
COMPETENCE CLASS F	Competence Class Name: Analytical Skills	At the Development level, for THIS sub competency	At the Independence level, for THIS sub competency	At the Profession Leader level, for THIS sub competency
	Competence Class Description: Applies analytical and proactive thinking to ensure robust and appropriate client solutions			
Competency F2: Decision making and recommendation	F2.1	Understands risk analysis role in developing recommendations for clients. Makes recommendations under supervision and tests practicality of recommendations with senior consultants	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	Is able to maintain a view of the 'big picture' in directing consultancy assignments and monitors the decisions and recommendations of consultants under their direction
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the "Independence" level?</b></p> <p>Engagement summaries, project notes, project reports will demonstrate consultant's analysis of the risks/returns associated with alternative solutions, and how they have used risk analysis to determine appropriate recommendations for client. Consultant will articulate how recommended solutions are tailored to client capacity. Client interviews/attestations, attestations from CMC sponsors, mentors, colleagues can also illustrate consultant proficiency in this competency.</p>				



		Range Statements		
COMPETENCE CLASS F	Competence Class Name: Analytical Skills	At the Development level, for THIS sub competency	At the Independence level, for THIS sub competency	At the Profession Leader level, for THIS sub competency
	Competence Class Description: Applies analytical and proactive thinking to ensure robust and appropriate client solutions			
Competency F3: Innovation	F3.1	Learns how to react flexibly to client feedback whilst retaining professionalism and objectivity. Explores with more experienced consultants ways to develop skills of creativity and innovation	Demonstrates flexibility, creativity and innovation in generating solutions and recommendations	Is regarded by members of the profession as an innovator who provides creative solutions
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the “Independence” level?</b></p> <p>Engagement summaries, project notes, project reports will demonstrate consultant’s ability to develop unique and innovative solutions, tailored to client capacity/capability, needs and requirements. Client interviews/attestations, attestations from CMC sponsors, mentors, colleagues can also illustrate consultant proficiency in this competency.</p>				

## COMPETENCE CLASS G: Personal Interaction

CMCs must be able to interact effectively with others in order to effectively generate value for their clients.

		Range Statements		
COMPETENCE CLASS G	Competence Class Name: Personal Interaction	At the Development level, for THIS sub competency	At the Independence level, for THIS sub competency	At the Profession Leader level, for THIS sub competency
	Competence Class Description: Takes and maintains responsibility for actions and impact of selected course of action on others. Includes: Handling complexity in the operating environment; interacting effectively with others to achieve desired outcomes; Demonstrating influencing skills; and demonstrating communications skills			
Competency G1: Taking responsibility for own actions	G1.1	Understands that one's actions have effects on clients and colleagues when developing solutions and making recommendations	Maintains responsibility to the client to remain within the scope of work. Identifies, and where appropriate notifies colleagues of, issues outside scope of work	Demonstrates responsibility for their own actions, and those of others who work for them, both within and external to the immediate scope of work. Is able to maintain a broad view of all issues surrounding the immediate work
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the "Independence" level?</b></p> <p>Consultant will articulate the process followed, and provide examples (evidenced by consultant's notes, client correspondence, consulting team correspondence, etc.) to illustrate how they have identified and reacted to scope issues. Client interviews/attestations, as well as attestations from CMC sponsors, mentors, and colleagues can provide additional evidence.</p>				

		Range Statements		
COMPETENCE CLASS G	Competence Class Name: Personal Interaction	At the Development level, for THIS sub competency	At the Independence level, for THIS sub competency	At the Profession Leader level, for THIS sub competency
	Competence Class Description: Takes and maintains responsibility for actions and impact of selected course of action on others. Includes: Handling complexity in the operating environment; interacting effectively with others to achieve desired outcomes; Demonstrating influencing skills; and demonstrating communications skills			
Competency G2: Handles complexity	G2.1	Works under supervision in client assignments	Works effectively in complex environments containing value-conflicts and uncertainties, needing, at most, only indirect supervision	Advises, coaches and mentors others in the techniques of handling complex issues and dealing with uncertainty
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the “Independence” level?</b></p> <p>Engagement summaries, consultant’s notes, project notes will show process and ability to recognize and react to ambiguity and complexity in consulting projects. Evidence will indicate autonomy of action, i.e., issues are identified, appropriate courses of action determined, and recommendations for action made by the consultant (rather than being directed externally).</p>				

		Range Statements		
COMPETENCE CLASS G	Competence Class Name: Personal Interaction	At the Development level, for THIS sub competency	At the Independence level, for THIS sub competency	At the Profession Leader level, for THIS sub competency
	Competence Class Description: Takes and maintains responsibility for actions and impact of selected course of action on others. Includes: Handling complexity in the operating environment; interacting effectively with others to achieve desired outcomes; Demonstrating influencing skills; and demonstrating communications skills			
Competency G3: Interacts effectively with others	G3.1	Understands methods to work with others. Assesses the effect of one's personality on working relationships. Builds a network of contacts	Shares views with others, expressing own ideas and thoughts clearly and openly while also being prepared to listen to other, differing, views before reaching conclusions. Where appropriate, uses professional network to seek contributions from others	Acts as a role model in building and maintaining effective working relationships
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the "Independence" level?</b></p> <p>Engagement summaries, client interviews/attestations, as well as attestations from colleagues, will show the consultant's ability to collaborate effectively; evidence should demonstrate consultant's ability to actively seek out alternative viewpoints as part of their process, to access external assistance where necessary, and to synthesize information and reach consensus.</p>				

		Range Statements		
COMPETENCE CLASS G	Competence Class Name: Personal Interaction	At the Development level, for THIS sub competency	At the Independence level, for THIS sub competency	At the Profession Leader level, for THIS sub competency
	Competence Class Description: Takes and maintains responsibility for actions and impact of selected course of action on others. Includes: Handling complexity in the operating environment; interacting effectively with others to achieve desired outcomes; Demonstrating influencing skills; and demonstrating communications skills			
Competency G4: Demonstrates influencing skills	G4.1	Develops techniques of persuasive verbal and written presentation	Presents ideas convincingly to the client to achieve specific outcomes	Invited to deliver confident and engaging presentations to a wide range of audiences
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the “Independence” level?</b></p> <p>Engagement summaries, project notes, project reports will show the process for ‘influencing without authority’, using logic, effective communication, and an understanding of client needs and wants, within the context of the client environment. Client interviews/attestations can provide additional support.</p>				

		Range Statements		
COMPETENCE CLASS G	Competence Class Name: Personal Interaction	At the Development level, for THIS sub competency	At the Independence level, for THIS sub competency	At the Profession Leader level, for THIS sub competency
	Competence Class Description: Takes and maintains responsibility for actions and impact of selected course of action on others. Includes: Handling complexity in the operating environment; interacting effectively with others to achieve desired outcomes; Demonstrating influencing skills; and demonstrating communications skills			
Competency G5: Demonstrates communication skills	G5.1	Demonstrates written and oral 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	Invited to deliver confident and engaging presentations to a wide range of audiences
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the “Independence” level?</b></p> <p>This will be demonstrated throughout the structured interview. Additional evidence can be obtained through client and/or colleague interviews/attestations.</p>				

## COMPETENCE CLASS H: Continued Learning and Development

CMCs must continually update and improve their skills and knowledge in order to provide value to their clients.

		Range Statements		
COMPETENCE CLASS H	Competence Class Name: Continued Learning and Development	At the Development level, for THIS sub competency	At the Independence level, for THIS sub competency	At the Profession Leader level, for THIS sub competency
	Competence Class Description: Plans self-development and shows track record of personal growth			
Competency H1: Self-development	H1.1	Follows a detailed and comprehensive Continuing Professional Development Program	Identifies opportunities and sets personal objectives for a tailored Continuing Professional Development Programme	Seeks technical expertise in new sectors, shares knowledge in many forums
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the “Independence” level?</b></p> <p>Consultant will provide documentation of their personal PD plan, as well as evidence to support continuous self-development through focused study, practise, reflection and application through their work. Evidence will support both general as well as specific technical competency improvement activities.</p>				

		Range Statements		
COMPETENCE CLASS H	Competence Class Name: Continued Learning and Development	At the Development level, for THIS sub competency	At the Independence level, for THIS sub competency	At the Profession Leader level, for THIS sub competency
	Competence Class Description: Plans self-development and shows track record of personal growth			
Competency H1: Self-development	H1.2	Follows a detailed and comprehensive Continuing Professional Development Program	Pro-actively seeks opportunities to further own development. Seeks and acts on feedback from clients, superiors, peers and team members to further personal development. Learns from own and others past assignments	Seeks technical expertise in new sectors, shares knowledge in many forums
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the “Independence” level?</b></p> <p>Consultant will maintain documentation that that shows a commitment to learning from assignments, reflecting on that learning, and applying it to future assignments. Attestations from clients, colleagues may provide additional evidence.</p>				



		Range Statements		
COMPETENCE CLASS H	Competence Class Name: Continued Learning and Development	At the Development level, for THIS sub competency	At the Independence level, for THIS sub competency	At the Profession Leader level, for THIS sub competency
	Competence Class Description: Plans self-development and shows track record of personal growth			
Competency H1: Self-development	H1.3	Develops awareness of a range of consultancy tools and techniques	Demonstrates a logical process to seek out new tools and techniques and identify their relevance to current and future work	Can advise others on appropriate sources of knowledge for personal development. May engage in tailoring and development of new tools
<p><b>Evidence of Competent Practice:</b>  <b>What evidence (specific behaviours, standards, results, processes, etc.) will demonstrate competence at the “Independence” level?</b></p> <p>As part of their development plan, will be able to articulate how they maintain awareness of, and develop competency in, new/emerging tools, techniques, and practices that will enhance their practice. Client attestations can provide evidence of new and innovative tools and techniques that have been learned and applied.</p>				

## Appendix A: Competencies Table

Competence Class	Class Description	Competency	Sub-competencies, and CMC standard
A: Client Business Insight	Understands the internal and external factors impacting on the project	A1: Client understanding	A1.1 Researches and understands the client business, the sector in which it operates, and its stakeholders.
		A2: Client business knowledge	A2.1 Analyses business culture, structure, processes, management and performance criteria based on scope of work
		A3: External Awareness	A3.1 Formulates analysis for client including the current political, economic, social, technological, legal and environmental factors
B: Consulting Business Insight	Understands the management consultancy environment and its commercial aspects	B1: Consultancy business knowledge	B1.1 Understands the nature of the management consultancy market, competitors and capabilities
		B2: Commercial aspects of assignments	B2.1 Demonstrates understanding of commercial aspects of projects including scoping, pricing, risk, and terms and conditions  B2.2 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
C: Functional Specialization	Recognised as an expert in own discipline	C1: Functional knowledge and skills	C1.1 Shows evidence of at least one year's management consulting experience in the declared primary functional specialism, PLUS A degree or professional qualification in the functional specialization, OR At least four years specialized work experience in the functional specialization.
	Understands the sectors in which clients operate	C2: Sectoral knowledge and experience	C2.1 Demonstrates how functional expertise has been applied in at least one business sector

Competence Class	Class Description	Competency	Sub-competencies, and CMC standard
D: Engagement Management	Determines the scope of client assignments. Manages client and other stakeholders' expectations. Engages expertise of others where appropriate	D1: Client Focus	<p>D1.1 Scoping client requirements:</p> <ul style="list-style-type: none"> <li>○ Understands and defines client requirements as evidenced by client agreement</li> <li>○ Presents clear comprehensive written proposals - if this forms part of the normal job role</li> <li>○ Engages the client in selecting, and taking ownership of, options for the structure and execution of the assignment</li> </ul> <p>D1.2. Managing Client Interface:</p> <ul style="list-style-type: none"> <li>○ Manages client, and consulting stakeholder, expectations</li> </ul> <p>D1.3. Partnering and Networking</p> <ul style="list-style-type: none"> <li>○ Understands and engages expertise of others alongside own</li> <li>○ Leverages network effectively to research and define client issues, generate innovative solutions for clients and/or inform the delivery solution</li> </ul>
		D2: Assignment management	<p>D2.1 Managing successful outcomes</p> <ul style="list-style-type: none"> <li>○ Manages client assignments successfully, ensuring that objectives, deadlines and budgets are agreed and delivered on time</li> </ul> <p>D2.2 Planning</p> <ul style="list-style-type: none"> <li>○ Demonstrates competent use of planning tools and techniques, and sets milestones appropriate for the size and scale of the assignment</li> </ul> <p>D2.3 Managing the Assignment</p> <ul style="list-style-type: none"> <li>○ Shows flexibility and adaptability to changing demands and deadlines. Demonstrates ability to manage ambiguity</li> </ul>

Competence Class	Class Description	Competency	Sub-competencies, and CMC standard
			<ul style="list-style-type: none"> <li>○ Keeps ‘big picture’ in focus but addresses detail and balances priorities</li> <li>○ Manages own time effectively to meet deadlines</li> <li>○ Where appropriate, demonstrates the ability to identify, develop, describe and allocate work streams for others to meet objectives, deadlines and budgets</li> </ul> <p>D2.4 Working on all phases of the assignment</p> <ul style="list-style-type: none"> <li>○ Operates competently in all areas of project delivery from offering through to closure</li> </ul> <p>D2.5 Managing handover to client</p> <ul style="list-style-type: none"> <li>○ Anticipates handover issues and addresses them during projects. Agrees handover process with client (e.g. skills transfer, implementation, sustainability, knowledge documentation). If withdrawing because the consultant cannot complete the project, offers the client recommendations on other resources that can complete the project</li> </ul>
		D3: Consulting Knowledge	<p>D3.1 Using a logical process approach to capturing and building knowledge</p> <ul style="list-style-type: none"> <li>○ Gathers, records and analyses data and information through ordered and logical processes and translates data into useable output</li> </ul> <p>D3.2 Sharing knowledge and experiences with others</p> <ul style="list-style-type: none"> <li>○ Shares acquired knowledge and experience with others in appropriate ways in order to build value for the client</li> </ul> <p>D3.3 Applying knowledge, tools and technical expertise to create value for client</p>

Competence Class	Class Description	Competency	Sub-competencies, and CMC standard
			<ul style="list-style-type: none"> <li>○ 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</li> </ul>
		D4: Consulting Process Techniques	<p>D4.1 Presentation</p> <ul style="list-style-type: none"> <li>○ Uses presentation tools and techniques effectively</li> </ul> <p>D4.2 Written reports</p> <ul style="list-style-type: none"> <li>○ Produces clear client correspondence and reports selecting most appropriate style to achieve desired outcome</li> </ul> <p>D4.3 Facilitation</p> <ul style="list-style-type: none"> <li>○ Manages group processes to achieve desired outcomes, using facilitation tools and techniques to maximise the group's decision-making potential</li> </ul> <p>D4.4 Coaching</p> <ul style="list-style-type: none"> <li>○ 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</li> </ul> <p>D4.5 Mentoring</p> <ul style="list-style-type: none"> <li>○ 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</li> </ul>

Competence Class	Class Description	Competency	Sub-competencies, and CMC standard
			<p>D4.6 Consensus Building</p> <ul style="list-style-type: none"> <li>○ Demonstrates skills in building consensus and managing conflict</li> </ul> <p>D4.7 Collaborative working</p> <ul style="list-style-type: none"> <li>○ Works effectively in a team with others and seeks support from others if appropriate</li> <li>○ Demonstrates, if in a management role, the management, development and appraisal of others and delegation of tasks</li> </ul>
		D5: Tools and methodologies- Selects and uses appropriate tools and methodologies	<p>D5.1 Selects and uses appropriate diagnostic tools, methods and techniques</p> <ul style="list-style-type: none"> <li>○ Evaluates tools and techniques against validity criteria and uses them to obtain best data, information or knowledge available, within budgetary or organizational constraints</li> <li>○ 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</li> </ul>
		D6: Risk and quality management	<p>D6.1 Managing risk and issues</p> <ul style="list-style-type: none"> <li>○ 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)</li> <li>○ 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</li> </ul>

Competence Class	Class Description	Competency	Sub-competencies, and CMC standard
			<p>suitable responses to issues that arise during an assignment</p> <p>D6.2 Managing quality</p> <ul style="list-style-type: none"> <li>○ Identifies success criteria to ensure required quality of deliverables is achieved</li> <li>○ Assures quality compliance of own deliverables and, where appropriate, those of the consultancy team</li> <li>○ Monitors and measures client satisfaction</li> </ul>
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	E1.1 Demonstrates appropriate ethical behaviour and adheres to the CMC Canada Uniform Code of Professional Conduct
		E2: Demonstrating professional behaviour	<p>E2.1 Ensures professional advice is sound and relevant to client's needs</p> <p>E2.2 Sets high personal standards, acts with integrity, respects confidentiality, and is courteous, reliable and responsive at all times in dealing with others</p> <p>E2.3 Understands and manages diversity in terms of culture, religion, race and gender</p> <p>E2.4 Demonstrates behaviour that earns the respect of professional colleagues</p> <p>E2.5 Applies professional and ethical criteria and withdraws from an engagement that discovers, or causes, illegal activity</p>

Competence Class	Class Description	Competency	Sub-competencies, and CMC standard
F: Analytical skills	Applies analytical and proactive thinking to ensure robust and appropriate client solutions	F1: Problem Solving	F1.1 Uses a logical, coherent and consistent approach to problem-solving. Challenges assumptions and probes details
		F2: Decision making and recommendation	F2.1 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
		F3: Innovation	F3.1 Demonstrates flexibility, creativity and innovation in generating solutions and recommendations
G: Personal Interaction	<p>Takes and maintains responsibility for actions and impact of selected course of action on others. Includes: Handling complexity in the operating environment; interacting effectively with others to achieve desired outcomes; Demonstrating influencing skills; and demonstrating communications skills</p> <p>Personal Interaction: Interacting effectively with others to achieve desired outcomes; Demonstrating influencing skills; and demonstrating communications skills</p> <p>Professional Maturity: Takes and maintains responsibility for actions and impact of selected course of action on others. Includes: Handling complexity in the operating environment;</p>	G1: Taking responsibility for own actions	G1.1 Maintains responsibility to the client to remain within the scope of work. Identifies, and where appropriate notifies colleagues of, issues outside scope of work



Competence Class	Class Description	Competency	Sub-competencies, and CMC standard
		G2: Handles complexity	G2.1 Works effectively in complex environments containing value-conflicts and uncertainties, needing, at most, only indirect supervision
		G3: Interacts effectively with others	G3.1 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
		G4: Demonstrates influencing skills	G4.1 Presents ideas convincingly to the client to achieve specific outcomes
		G5: Demonstrates communication skills	G5.1 Conveys information in a clear focused style using effective verbal, non-verbal, graphical, written and oral communication techniques in formal and informal situations
H: Continued Learning and Development	Plans self-development and shows track record of personal growth	H1: Self-development	<p>H1.1 Identifies opportunities and sets personal objectives for a tailored Continuing Professional Development Programme</p> <p>H1.2 Pro-actively seeks opportunities to further own development. Seeks and acts on feedback from clients, superiors, peers and team members to further personal development. Learns from own and others past assignments</p> <p>H.1.3 Demonstrates a logical process to seek out new tools and techniques and identify their relevance to current and future work</p>

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**CMC-Canada  
Canadian Association of Management Consultants  
701, 372 Bay Street  
Toronto, ON M5H 2W9  
(416) 860-1515  
cmc-canada.ca**