

CMC-Canada Oral Assessment Preparation Requirements

Unless stated otherwise, the below requirements must be submitted to CMC-Canada national office (email, fax or mail) prior to attending the Oral Assessment. Please read all instructions carefully.

Step 1: Prepare Engagement Summaries

- You must prepare and submit engagement summaries of three (3) representative consulting assignments with which you have either led or been involved during the past three (3) years, demonstrating 1,200 hours in management consulting per year. One assignment presented must have been completed within the last 12 months.
- Each of the three engagement summaries should be approximately two to four (2-4) pages in length.

Engagement summaries should include the following information. It is **strongly recommended** that these section headings be used in each summary to facilitate the review process:

1. Please place at the top of each page (your) Candidate Name and Candidate Membership Number.
2. Engagement Name, Dates & Size: Identify the project's name, its start and end dates and its size (in terms of total effort or fees). Indicate the industry and context of the engagement.
3. Candidate's Specific Role: Identify your specific management consulting role(s) and level of participation (total effort or fees) on the project. Include the number of actual consulting hours you delivered on the engagement.
4. Objective(s) of the Engagement: List both the project's overall objectives and specifically what you planned to achieve in your role.
5. Methodology Used: List the individual steps or phases you undertook to complete your role in the project. Do NOT simply list the names of the methodologies used.
6. Results vs. Objective(s): List the results you achieved in your role and link them to the project's overall objective(s). Focus on those project results for which you were directly responsible or involved.
7. Client Liaison: With whom in the client organization did you have contact? Include their title and their role on the project. How frequent was the contact? What was the nature of the contact?
8. Demonstration of Independence: How did you (as an external or internal consultant), carry out the engagements with the required degree of independence and objectivity, and function in a role that met these requirements?

9. **Professional Development:** How did you grow as a consultant from this engagement? How has the process heightened your awareness of the role of the CMC? What were the outcomes, which would ultimately benefit future clients? How have you applied that knowledge to subsequent engagements? *DO NOT include how the project improved your knowledge of the project's subject matter or what the client learned. DO include evidence that reflects your increasing insights into your professional competencies, knowledge, skills and abilities, and approach to consulting (refer to the CMC Competency Framework).*
- One CMC sponsor for each candidate must review and sign-off each page of each engagement summary before it is submitted to National Office for review. That same CMC sponsor must also sign your Experience Declaration Form (see Step 4).

Step 2: Obtaining Client References

- For each of the three (3) engagement summaries above, you must provide the name and contact information (phone number and email) of the client for whom you conducted the work. Please include this information at the top of each of your three engagement summaries.
- You must have agreement from these clients to provide direct feedback to CMC-Canada on your consulting engagement. For one of the three clients, you must also obtain agreement from them to have you exhibit a sample of deliverables (see Step 3) at the time of your Oral Assessment. (A signed permission document may be required from them, or your client may ask you to sign a non-disclosure other than for the sole purposes of the Oral Assessment process.)
- CMC-Canada will contact the clients directly to provide their feedback on your consulting work with them.

Step 3: Sample of Client Deliverables

- You must bring with you to the Oral Assessment the sample of client deliverables for at least one of your engagement summaries. This should consist of materials you personally developed or that were developed under your leadership within the past three years.
- The sample of deliverables provides tangible evidence of several consulting competencies. The deliverables are reviewed during the Oral Assessment on their own merit without regards to apparent or intentional similarity to that of any other candidate. These materials will be shown to and discussed briefly with the oral assessors at appropriate times during the interview, but **must** be taken away by the candidate at the conclusion of the Oral Assessment process.

Examples of Eligible Sample Deliverables:

- Client Brief
- Client Proposal
- Letter of Understanding
- Contractual arrangements

- Project/Assignment Plan covering scope, time, cost, risk, resourcing, communication, procurement approvals, reviews
- Work plans
- Tracking and control documents for scope, time, cost, risk and resource utilization
- Requirements Document
- The Diagnosis Report
- The Action Planning Report
- The Implementation Report
- The Termination Report
- Presentation Materials (e.g. Powerpoint slides)
- Industry and Competitor Analysis
- Business Case or Business Plan
- Questionnaires and Interview Guides
- Critical Success Factors
- Pricing Services and Fees
- Options Analysis
- Design specifications
- Recommendations
- Performance Measures/Indicators
- Situation/Organization Review (Interim or Final Report)
- Stakeholder Management Strategy
- Communication Strategy
- Variations to Engagement

Step 4: Experience Declaration Form

- You must submit a signed Experience Declaration Form attesting to at least three years/1,200 hours a year in the business of management consulting including the immediate past 12 months. This declaration must be signed by one of your CMC sponsors.

Confidentiality

- The CMC's who will conduct your oral assessment will have signed a confidentiality/non-disclosure agreement, providing you the assurance that the conversations with you, and the sharing of engagement summaries and client-confidential sample deliverables will be used solely for the assessment of your knowledge, skills and competencies that are necessary in becoming a CMC.
- The client deliverables remain with you, the candidate, and the copies of the engagement summaries used by the assessors are either destroyed or returned to your file at CMC-Canada's national office for secure retention.

Checklist of Your Preparation Requirements

Prior to attending the Oral Assessment, you must prepare the following:

- A current CV conveying your career work history
- Contact information for three (3) clients for whom your engagement summaries relate:
 - Agreement from three clients to provide references – clients will be contacted by CMC-Canada and asked to provide direct feedback to CMC-Canada on your consulting engagement
 - Agreement from one of those clients to have you share sample deliverables at the time of your Oral Assessment – a signed permission or non-disclosure document may be required
- Three (3) engagement summaries related to the above reference clients - using the above section headings. One of your sponsors must review and initial each page of each summary.
- Signed Experience Declaration Form (by you and one of your sponsors)

On the day of your Oral Assessment, you must also bring the following:

- Sample of Client Deliverables from one of your client engagements – with the client's consent (you leave the interview with them in your possession)

If you have any questions regarding these guidelines, please contact Suzie Fernandes, Director, Membership and Certification, 416-860-1515/800-268-1148 ext. 8 or sfernandes@cmc-canada.ca.