

## cNotes

### News and Ideas for Canadian Management Consultants

June 2008

#### Table of Contents

Message from the Chair, Ken  
Davies, FCMC - 1

#### What's New

David Maister to Keynote  
Management Consulting  
Conference in Kananaskis - 2

Heather Osler to Retire as  
CMC-Canada President and  
CEO - 3

#### Our Members

Congratulations FCMC, CMC  
and Awards Recipients - 4

Members in the News/  
CMC-Canada in the News - 6

#### Association News and Reminders

CMC-Ontario-GTA Chapter  
Educates Local Consultants - 7

CMC-Canada's PEMD  
Partnership - 7

#### Information Resources

Building Workforce Excellence:  
A Municipal HR Strategy - 8

Indecent Proposal - 8

Major Changes in the Federal  
Lobbyist Act and  
Regulations - 8

CMC-Canada's Value  
Proposition Presentation - 9

PD and Networking Events for  
Management Consultants - 9

## A Very Exciting Time for CMCs in Canada

*Message from CMC-Canada Chair, Ken Davies, FCMC*

It is always fun to present good news. The first five months of 2008 have seen dramatic progress at CMC-Canada.


The Executive Stream Task Force (formerly the Growth Task Force) has worked with 14 mid- and large-sized consultancies across Canada out of the target group of 33 firms. There have been 24 executive stream candidates confirmed into the CMC process so far and another 40 are in process. Yet another 185 potential candidates have been identified to enter the experienced and entry level streams. Three firms have committed to make the CMC designation a standard for their consultants and are working with us to customize training programs based upon our CMC Competency Framework and Common Body of Knowledge. We are now targeting Courtyard, Deloitte, KPMG and PricewaterhouseCoopers. The cost-to-date for the task force is roughly \$25,000. By June 30th year end our new members already signed up will cover that cost in the first year.

Thanks to Tim Shaw, FCMC, and Bob McCulloch, FCMC, for their ongoing leadership of this initiative.

The new Advocacy Task Force under the leadership of Todd Williams, CMC, is following the CMC-Canada Marketing and Communications Plan. There have been positive new developments dealing with the Government of Canada in the areas of recognition for the CMC designation.

CMC-Canada (under the leadership of Dorothy Milburn-Smith, CMC) is representing large firms in discussions with PWGSC on its proposed revamping of procurement of consulting services. We have also been fortunate to have a number of hits in the media running from CBC Radio's The Current to several major newspapers.

*Continued on page 2.*



Ensure a  
**HIGHER LEVEL**  
of management  
consulting –

Get a CMC  
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**Winning in the global economy demands a business perspective with a world view. Give yourself the best possible advantage – a higher level of management consulting.**

A CMC's insight can mean the world to your business.

Visit [cmc-canada.ca](http://cmc-canada.ca) for more information on management consulting and the CMC designation.

## Message from the Chair Continued...

The Board has created a Professional Development Task Force to respond to the demand for professional development programs from the firms re-engaged with CMC-Canada. Lynn Bennett, CMC, and her team will be publishing a terms of reference in June. Ten PD events will be partially sponsored by CMC-Canada and held across the country in 2008-09.

The National Certification Committee (NCC) continues its work to improve the CMC designation examination process. All but two provincial Institutes have approved the NCC's work on a national oral exam direction.

The new website is progressing well and plans to be released in October. It will offer many new self-serve membership functions and greatly expanded communication tools.

The Alberta Institute has arranged a conference on September 26-27 in Kananaskis, Alberta (one hour west of Calgary). David Maister leads an impressive list of speakers. Please consider coming to this event, which is being held in conjunction with CMC-Canada's AGM.

Heather Osler, CAE, CMC-Canada's President and CEO, retires in one month after 23 years with CMC-Canada and its predecessors. We will miss Heather's leadership and energy. The Board's transition team is continuing its effort to manage the transition. Our Manager of Membership and Administration, Mary Blair, CAE, has agreed to take on the extra responsibility of being the Managing Director of CMC-Canada. This job will focus on running all aspects of the CMC-Canada office. A new position will be created to serve as a public face for CMCs in Canada. I have volunteered to assume this role for the remainder of 2008.

Finally, the Board has approved in principle the budget for the upcoming year, which conservatively allows for more than 10% of the budget to be spent on discretionary items.

Ken Davies, FCMC  
Chair, CMC-Canada

## What's New

### David Maister to Keynote Management Consulting Conference in Kananaskis *NEW: Additional Speaker Line-up Announced*

On September 26-27, 2008 David Maister, widely acknowledged as one of the world's leading authorities on the management of professional service firms, will keynote the CMC-Canada/CMC-Alberta Management Consulting Conference in Kananaskis, Alberta.

We are also pleased to announce that the conference will feature presentations from the following distinguished speakers:

- Dr. Harrie Vrendenburg (University of Calgary) on The Canadian Oil Sands - Development of this Resource
- Dr. Roy Suddaby (University of Alberta) on Managing Change in Knowledge Intense Industries
- Dr. Terry Power (Royal Roads University) on Mental Models for Consulting Using New Tools and Techniques

- Dr. Peter Sherer (University of Calgary) on Reputation and Disruptive Technological Innovation in Professional Services
- Dr. Mike Percy (University of Alberta) on the Health Care Challenges Facing Canada

And you won't want to miss our expert panel discuss the Canadian economy, and offer their predictions for the year ahead.

**Be sure to register before June 15 and take advantage of our Early Bird Discount!**

Click here for more information.

**Please note:** A block of rooms has been reserved for September 26 and 27, 2008 at the Delta Kananaskis Hotel at a special discount rate. Room reservations must be made by August 30 in order to obtain the special rate. Call 1-866-432-4322 to book your room and be sure to reference the CMC-Canada group code: GL072. Download the Guestroom Request Form here.

## Heather Osler to Retire as CMC-Canada President and CEO

On June 30, 2008, Heather Osler, CAE, will step down as President and CEO of CMC-Canada after spending 23 years advancing the management consulting profession in Canada. To say her career with CMC-Canada is extensive is an understatement.

But first, how it all began.

In 1982, after spending 15 years volunteering in the areas of employment, housing and support services for physically challenged adults in Canada, Heather entered the association world. Her first job was with the Society of Management Accountants of Canada, where she managed the national introduction of a new designation titled, 'Certified Management Accountant'.

In 1985, Heather joined the Institute of Management Consultants of Ontario as Executive Director. She also had responsibility for managing the Canadian Association of Management Consultants (CAMC), an industry association

comprising 20 firms. The original CAMC was formed with the same set of underlying principles as those which exist today, while focusing initially on firms as opposed to individuals. Within three years of founding CAMC, the Directors oversaw the creation of the provincial Institutes, whose focus was the individual rather than the firm. Heather also managed the Institute of Management Consultants of Canada – the umbrella organization for the Institutes. Over time, the original CAMC folded and gave its name in 1997 to the current Canadian Association of Management Consultants, the CMC-Canada we know today.

In her position as President and CEO (a role she has held since 1997), Heather has worked tirelessly to advance our profession, the Certified Management Consultant (CMC) designation and our Association.

She elevated the status of the designation in the public sector procurement process – most recently, assisting CMC-Ontario in its successful effort to have the CMC designation included on all management consulting-related Government of Ontario RFPs. She's given credibility to the profession on the federal and public stages through advocacy initiatives.

Heather introduced a variety of programs to enhance CMC-Canada members' skills, practices and profiles;

the Management Advisory Service (MAS) program (funded by the Canadian Government's National Research Council-Industrial Research Assistance Program) is just one example. Through Heather, focused research on the profession in Canada – the only research of its kind – was developed and continues to be delivered to members, government, the general public and media. CMC-Canada's 2007 Industry Study achieved coverage in more than 40 media sources this year.



Heather Osler and the CMC-Canada Staff. (Back row, left to right): George McClellan, Mary Blair. (Middle row, left to right): Darlene Hoornstra, Heather Osler, Audrey Hoddinott. (Front row, left to right): H el ene Th eberge, Suzie Fernandes

Heather has played a key role in the International Council of Management Consulting Institutes (ICMCI) since its inception in 1987. She managed a marathon of ICMCI meetings in Toronto in 1989, which eventually led to the first international reciprocity agreement for the profession, signed in 1991 between the U.K., U.S.A., and Canada.

Throughout her career, Heather assisted with the creation of consulting associations in other regions of the world, including the Caribbean and Kazakhstan. Thanks to her efforts, a memorandum of understanding was signed last year with a business school in India, providing for the export of CMC-Canada's Essentials of Management Consulting Course, and CMC trainers to deliver the course.

Heather has seen CMC-Canada grow from 1,200 members in 1985 to more than 3,000 members today. The profession's international reciprocity agreement encompassed three countries in 1991; today, 27 countries enjoy reciprocity with one another through the agreement.

## Heather Osler article continued...

Not one to avoid follow-through, Heather has implemented systems to ensure her well-oiled machine keeps running after she retires. Examples include her work with the Association's recent growth initiative, a new marketing and communications plan to direct initiatives over the next three years, an ongoing MAS program and many others. CMC-Canada's current board, volunteers and staff continue to drive these initiatives forward.

According to Ken Davies, FCMC, CMC-Canada Chair, "We will miss Heather's energy and enthusiasm. She has built and nurtured a vibrant Association and CMC-Canada community. Her legacy will forever remain part of the organization's identity."

Regarding her retirement – in Heather's own words, "Life is brief – enjoy the ride."

To her staff, Heather has been a mentor, source of humour, listening ear and friend. We are inspired by her leadership style, which places relationships, growth and respect front and centre. We recognize that in an ever-changing landscape of volunteers and leaders, in this vast country – Heather has been the thread holding the CMC-Canada quilt together.

She will be sorely missed by volunteers, staff, members – and all of her friends. Thank you Heather, for your knowledge, insight and enthusiasm. We wish you and your husband Derek all the best.

## Our Members

### Congratulations FCMC, CMC and Awards Recipients!

CMC-Canada and the regional Institutes and Chapters would like to congratulate our recent FCMC, CMC and Awards recipients.

#### FCMC Designation Recipients

FCMCs are individuals who have been broadly recognized as being outstanding professionals within and beyond the confines of management consulting. They have been singled out by a combination of peers, clients, colleagues and community members for their integrity, pioneering efforts, innovation, accomplishments, and contributions to both their profession and community.

The following CMC-Canada members were awarded the FCMC distinction in 2008 (as of May 30, 2008):

#### CMC-Atlantic Canada

William A. Collins, FCMC  
Jane Deed Davison, FCMC  
J. Patrick O'Neil, FCMC

#### CMC-British Columbia

Robert G. Shirra, FCMC



New CMCs from the CMC-Ontario-Greater Toronto Area Chapter with CMC-Ontario President Lynn Bennett, CMC

#### CMC-Saskatchewan

Richard P. Fontanie, FCMC  
Sherry L. Knight, FCMC  
Peggie Koenig, FCMC  
Linda C. Prafke, FCMC

## Awards continued...

### CMC Designation Recipients

The CMC designation is the profession's only international certification mark, recognized in 43 countries. It represents a commitment to the highest standards of consulting and adherence to the ethical canons of the profession.

The following CMC-Canada members received their CMC designation in late 2007/2008: (as of May 30, 2008):

#### CMC-Alberta

Antonio Colabella, CMC  
Steve Morin, CMC  
Michael Watson, CMC  
Anthony Kwiatkowski, CMC

#### CMC-Atlantic Canada

Maureen Connolly, CMC  
Conrad Richard Doucet, CMC  
Christa Hornberger, CMC, Honour Roll, Gold Medal  
Award Winner  
Kerry John Loughlin, CMC, Honour Roll  
Stephen McDonald, CMC  
Kenneth G. Thomas, CMC

#### CMC-British Columbia

Feisal Nasser, CMC  
Angela Griffiths, CMC  
Kirsten Ploegmakers, CMC  
Stephanie Slater, CMC, Honour Roll  
Thomi Glover, CMC  
Tony Wanless, CMC



CMC Reception, CMC-Ontario-Southwestern Ontario Chapter



New CMCs and award winners from the CMC-Ontario-Eastern Ontario Chapter with CMC-Ontario-EOC Chapter Chair Stephen Fanjoy, CMC

#### CMC-Manitoba

Thomas B. Ormiston, CMC

#### CMC-Ontario

Herminia Bastos, CMC  
Ronald A. Brophy, CMC  
Andrea Clennon, CMC  
Charles E. Côté, CMC  
Kelly S. Culver, CMC, Honour Roll  
Brendan R. Cunneen, CMC  
Eric W. de Maat, CMC  
Maria Helena DeSousa, CMC  
Jinna Findlay, CMC  
Kevin S. Flynn, CMC  
Cameron Graham, CMC  
Graham Herbert, CMC  
Frances Isaacs, CMC  
Nicholas R. Lal, CMC, Honour Roll  
Jon Linton, CMC  
Richard M. Lundeen, CMC  
Craig M. Mackay, CMC  
Andrea MacKenzie, CMC  
Janet MacPherson, CMC  
D. Tony Mahabir, CMC  
Niaz H. Malik, CMC  
Guy Alexander Mason, CMC  
Richard G. Monk, CMC  
W. Trent Murdoch, CMC  
Promil Paul, CMC  
Lana Phair-Sutherland, CMC  
Stevan B.G. Ralph, CMC  
Ralph L. Ramkerrysingh, CMC  
Alan L. Saibe, CMC  
Jack F. Shand, CMC  
Alan Small, CMC  
Kenrick K.C. Sproul, CMC

## Awards continued...

CMC-Ontario recipients continued...

Daniel Stechey, CMC  
Cathy M. Tait, CMC  
Audrey Talpaert, CMC  
Kam Pui Tang, CMC  
Emalayan Thurairajah, CMC  
George H. Toner, CMC  
Larry J. Trenwith, CMC  
Abdul Waheed, CMC  
Wilfrid J. (Bill) Wilkinson, CMC  
Susan Wimperis, CMC

### CMC-Saskatchewan

Jason Aebig, CMC  
Jana Danielson, CMC, Honour Roll

### TD Insurance Meloche Monnex Gold Medal Award Winner

The TD Insurance Meloche Monnex Gold Medal Award was given to **Christa Hornberger, CMC**, partner with Halifax Global Inc., a strategic and business planning management consulting firm. The award recognizes the individual who achieved the highest mark on the comprehensive exam; one of the final steps in achieving the CMC designation.



Christa Hornberger, CMC, TD Insurance Meloche Monnex Gold Medal Award Winner, speaks at the CMC-Atlantic Canada CMC Reception.

### President's Awards

During CMC-Ontario's recent CMC/FCMC celebrations, Lynn Bennett, CMC, President of CMC-Ontario, recognized three members for their unique contribution to the profession. This great honour was bestowed upon the following members:

David Bratton, FCMC  
Dorothy Milburn-Smith, CMC  
Ingrid Pregel, CMC

### Honorary Member Awards

Honorary memberships were awarded to individuals who performed distinguished service to the profession and science of management in Atlantic Canada. This year, the following gentlemen received the award:

Gordon Fullerton, St. Mary's University  
John Chamard, St. Mary's University

## Members in the News

Our members continue to make astounding contributions to the profession and their communities. Read their stories in the links below.

**David Berger, CMC (Ontario)** was featured in an article titled "How Berger Hits the Spot", published on [www.PlantServices.com](http://www.PlantServices.com) in April 2008.

**David Bratton, FCMC (Ontario)** had an article titled "Building Workforce Excellence: A Municipal HR Strategy" published in the April 2008 edition of *Municipal World*. More information about this article can be found on page 8 of *cNotes*.

**Christa Hornberger, CMC (Atlantic Canada)** was featured in the *Nova Scotia Business Journal* and *The Chronicle Herald* for achieving the TD Insurance Meloche Monnex Gold Medal Award.

**Allan Smith, FCMC (Alberta)** was featured in an article titled "Negative Perceptions Haunt Sales Professionals", published in the *Calgary Herald* on February 9, 2008.

### CMC-Canada in the News

In March, **CMC-Canada's 2007 Industry Study** was featured in "Number of Consultants on Steady Rise", published in the *Montreal Gazette* and "Self-employed Workers on the Rise in Canada", published in *The Vancouver Sun*. The study and CMC-Canada Chair, **Ken Davies, FCMC**, were also featured in "Wanted: One Contract at a Time", published in the *Globe and Mail*.

On May 8, 2008, **Bob McCulloch, FCMC (Ontario)** represented CMC-Canada in a series of interviews aired on CBC radio shows across Canada. The topic of the interviews was employee empowerment.

In May 2008, **CMC-Canada's** MOU with SMOT business school, located in Chennai, India was featured on several online news sources, including: Business Standard, India eNews and MBA Universe.com.

## Association News and Reminders

### CMC-Ontario-GTA Chapter Educates Local Consultants

On May 12, CMC-Ontario-GTA Chapter hosted an event to instruct local consultants on how to build and sustain a consulting business. The event, which comprised both a speaker presentation and panel session, was attended by more than 80 consultants from the Toronto area.

Jim Love, FCMC, began the sessions with an introduction to consulting. He spoke about designing a product, crafting a value proposition, defining metrics and finding tools – and additional resources – to help build a consulting business. He discussed the variation in consulting companies – from boutique to large firms. His presentation included tips on how to stay in business, plus tax, legal and insurance information.



Jim Love, FCMC, speaks on starting a management consulting practice.



Bob McCulloch, FCMC, moderates a panel discussion on sustaining a successful management consulting practice.

A panel discussion, moderated by Bob McCulloch, FCMC, provided audience members “a broad spectrum of consulting experiences and useful, actionable ideas” for developing and sustaining a successful practice. Panelists included: Lynn Bennett, CMC; Gus Gillespie, FCMC; Guy Mason, CMC; and Paul Macmillan, CMC. Panel topics varied from understanding the buying process and staying strategically focused, to finding more business and implementing the right marketing concepts.

The event also included a presentation by Walter Bell, which focused on building a new client base using an intriguing demographic concept.

Attendees left feeling confident about building their own consulting business.

### CMC-Canada’s PEMD Partnership Expanding Consultants’ Business Opportunities

CMC-Canada is currently partnered with the Program for Export Market Development (PEMD) for Associations with the objective of increasing our members’ international business opportunities. PEMD provides financial support to Canadian national sectoral associations for the generic export promotion of their industry’s products or services. To receive support, an association’s activities must relate to the improvement of market access and the development of market intelligence.

The assistance provided to CMC-Canada is results-focused. When applying for funding, CMC-Canada must identify specific performance indicators for each

activity planned as well as projected key results for the overall contribution. Throughout the year, our Association utilizes a rigorous self-evaluation structure to assess the effectiveness of these initiatives.

#### **More on PEMD...**

PEMD has been a vital component of the Government of Canada’s international business development strategy since 1971. According to its latest annual report, in 2006-2007 PEMD-Associations spent \$3.38 million helping trade associations undertake the generic export promotion of their industry sectors.

### Building Workforce Excellence: A Municipal HR Strategy

By David Bratton, FCMC

There are many difficult and challenging issues facing every municipality in Canada, not the least of which are issues relating to people. Municipalities spend much of their time and effort solving issues such as municipal infrastructure, finances, and planning for development. These are the main activities for both councils and administrators. Unless there is a major crisis like a strike or a labour shortage, HR issues rarely make it to the front seat.

Why, then, is it important to invest in human capital? A comprehensive approach to managing and growing the strengths of employees has a significant and lasting payoff. Building an excellent workforce, capable of providing a high level of service to the community, is key to improving a municipality's productivity. A successful people strategy is also key to attracting and retaining top talent – something that every municipality with aspirations of excellence needs to do to be successful.

[Read the full article here.](#)

### Indecent Proposal

By Cal Harrison

Use of the Request for Proposal (RFP) procurement methodology to select a management consulting firm is increasingly characterized as inaccurate and expensive by experts across North America. As a consultant, are you aware of what it's costing you and your clients?

As a business development advisor to North American management consultants, I am constantly reminded how much they dislike having to participate

in an RFP. In fact, many have made avoiding RFPs a business goal for their practice.

Although the RFP process is still touted as a way for buyers to objectively evaluate and select from multiple consulting providers while keeping a lid on costs, far too many RFPs issued by private sector, non-profit or government buyers fail to achieve these desirable goals.

[Read the full article here.](#)

### Major Changes in the Federal Lobbyist Act and Regulations

As part of the *Accountability Act*, amendments were made to the legislation governing the registration and conduct of federal lobbyists. The new rules come into force and effect on July 1, 2008. For the benefit of CMC-Canada members who deal with the federal government, CMC-Canada has created a summary of the rules and their implications for our membership.

[Read the full summary here.](#)

PREFERRED GROUP RATES  
ON HOME AND AUTO INSURANCE

Members of  
**CMC-Canada,**  
Take advantage of  
your status!

**YOU COULD  
WIN \$50,000  
IN CASH FOR YOUR  
RENOVATION PROJECTS!**

**TD Insurance**  
Meloche Monnex

## Download CMC-Canada's Value Proposition Presentation – Visit [www.cmc-canada.ca](http://www.cmc-canada.ca) today!

Are you giving a presentation on CMC-Canada and the values of a CMC-Canada membership?

Equip yourself with information on the Association and benefits of membership. We have created the Value Proposition Recruitment Presentation – containing facts on CMC-Canada, the CMC designation, the management consulting industry and member services – to help you deliver the most effective presentation and recruit new members into the Association.

Download the presentation here.

### **Help Us Promote the CMC Designation!**

We also encourage CMC members to add the logo and positioning statements to business cards, letterhead, proposal documents or PowerPoint presentations.

Download the CMC logo or the designation's positioning statements here.

**Note:** Copies of the Uniform Code of Professional Conduct are available for members. Contact [htheberge@cmc-canada.ca](mailto:htheberge@cmc-canada.ca) for your copy today.

## Professional Development and Networking Events for Management Consultants

CMC-Canada's website includes a listing of PD and networking events taking place in Canada – and beyond – for those interested in management consulting.

Upcoming CMC events include:

### **June 16 - CMC-British Columbia - Southern Interior Chapter**

Meet and Greet Wine and Cheese Reception

### **June 19 - CMC-Ontario-GTA Chapter**

Celebration in Honour of Heather Osler, Retiring President and CEO, CMC-Canada

### **September 26 - 27 - CMC-Canada/CMC-Alberta**

Management Consulting Conference in Kananaskis, Alberta

### **November 26-28 - ICMCI**

Inaugural Meeting of the America's Hub in Barbados

### ***In Memoriam:***

CMC-Canada Life Member, Ian King, CMC, passed away on January 31, 2008.

On behalf of all members, we recognize Ian's efforts to advance the management consulting profession in British Columbia.

### **ATTENTION ALL CMCs!**

Don't forget to keep track of your CPD points throughout the year. **And remember:** all PD events are worth one point per hour towards your CPD requirements.

### **cNotes is published by CMC-Canada**

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