



## **cNotes National Edition | March 2006** **News and Ideas for Canadian Management Consultants**

---

### **CAMC Career Centre – Recent Postings**

**Senior Management Consultant, Financial Services** – EDS Canada Inc., Toronto ON

**Advisory-Director, Change and Program Effectiveness Practice Leader** –

PricewaterhouseCoopers LLP, Ottawa ON

**Organizational Change Consultant** – IBM Canada, Ottawa ON

**Organizational Change Consultant: Technology Implementation** – IBM Canada, Calgary AB

**Analyst, Advisory Services** – KPMG, Halifax NS

Visit us today at [www.camc.com/index.cfm?PID=12755](http://www.camc.com/index.cfm?PID=12755) to view these opportunities and many more (CAMC member login required).

---

### **Contents**

- Message from the Chair
  - Congratulations! 2005 CMC Comprehensive Examination Gold Medalist and Honour Roll
  - David Maister: The Courage of Your Convictions – Tuesday, May 16, 2006
  - Professional Development and Networking Events for Management Consultants
  - Member in the News: Chris Jones, FCMC
  - Eight Steps to Avoid and Minimize Errors & Omissions Claims
  - CAMC Affinity Centre: Instant access to real savings on a wide range of brand name products and services that you use every day - at work and at home!
  - How to get the CMC logo
- 

### **Message from the Chair**

*Note to readers: On February 8, 2006 the Association appointed its new Board of Directors and Officers, including Ted Stedman FCMC as Chair.*

*Ted joined the Institute of Certified Management Consultants of British Columbia (ICMCBC) in 1990 and earned his CMC in 1994. He is a past president of ICMCBC, served on the National Certification Board of CAMC, and was a regular participant in the CMC marking process. Ted is a champion for the Cystic Fibrosis Foundation, an organization of particular importance to his family as his younger son was diagnosed with the disease as a young child. In recognition of his outstanding contribution to the profession, the consulting industry and the community, Ted was elected a Fellow of the BC Institute in 2003.*

*Ted earned a B.Sc. in Computer Science from the University of British Columbia and an MBA from the Ivey School of Business. He is currently Vice President of Corporate Services for Sierra Systems Group in Vancouver.*

Dear Association Members,

It is my pleasure to keep you apprised of the activities the CAMC Board is undertaking on your behalf. In 2005 we drafted a new governance model and received approval from the Association's members to implement that model. We believe it will improve the effectiveness of our organization; create closer communication links between CAMC, the Institutes, and the members; and define accountabilities at all levels. Representatives from coast-to-coast participated in this initiative and we thank them all for their contribution.

I would also like to thank my predecessor, David Bolton FCMC, for his outstanding leadership during the process. The Board and I look forward with much enthusiasm to a renewed focus on delivering value to members.

Two related areas are of primary importance to us, demonstrating value for members and membership growth. To achieve our goals, a 120-Day Task Force has been struck to focus on recruiting new members and demonstrating the value added by the association to existing members. We will reach deeply into our regional organizations and mobilize our membership in this important initiative. And we look to each of you to assist us in our endeavours.

Another key area of interest is the CMC certification program. Our National Certification Committee is completing the development of a new and comprehensive Body of Knowledge for management consulting. The recent final examinations are now complete and the Provincial Institutes will soon be celebrating their success at local events. It is important that we all support these opportunities to welcome new members to the fold.

Finally, as part of our quest to ensure the organization is on a sound footing, we have struck a Financial Modeling Task Force to review and consider scenarios that will allow us to deliver more external value to our members.

I look forward to reporting further on these initiatives in the coming months. On behalf of the Board, I would like to thank you for your continued support of the Association and the profession.

Sincerely,  
Ted Stedman FCMC

---

### **Congratulations! 2005 CMC Comprehensive Examination Gold Medalist and Honour Roll**

The Association is pleased to announce the Gold Medalist in the 2005 Comprehensive Examination:

***Mr. Tim Breitreutz, Calgary, Alberta***

The following candidates were named to the National Honour Roll:

***Mr. Richmond Graham, Regina, Saskatchewan***

***Ms. Louisa Horne, Halifax, Nova Scotia***

***Mr. Aiman El-Ramly, Richmond, British Columbia***

***Ms. Katie Hill, Kelowna, British Columbia***

***Ms. Tracy Blagdon, Vancouver, British Columbia***

***Mr. Mark Towhey, Toronto, Ontario***

***Ms. Deborah McNevin, Whitehorse, Yukon Territory***

***Mr. John David Fentie, Mississauga, Ontario***

***Ms. Heather Cartwright, Georgetown, Ontario***

***Mr. Wasim Jalal, Toronto, Ontario***

The Association congratulates everyone on their outstanding achievements!

---

### **David Maister: The Courage of Your Convictions**

**It's not how good you are – it's how much you want it**

On Tuesday, May 16, 2006, the Association presents a premier event with David Maister, a world-renowned thought leader on the management of people and professional services firms.

**Tuesday, May 16, 2006**

**9:00 a.m. to 3:30 p.m.**

**The Dominion Club, 1 King Street West, Toronto**

**Members: \$149 per person; Non-members: \$195 per person; Table of eight: \$1,200  
Cost includes lunch**

David will speak about how to navigate the world of consulting, using his more than 20 years of experience advising clients and consultants working in the professional services industry.

Visit [www.camc.com/index.cfm?PID=16186](http://www.camc.com/index.cfm?PID=16186) for full details and to register.

Visit [www.camc.com/index.cfm?PID=12639](http://www.camc.com/index.cfm?PID=12639) to read recent articles by David Maister (CAMC member login required).

*Sponsored by:*

*Platinum Sponsor: **Microsoft Canada***

*Silver Sponsors: **Deeth Williams Wall LLP; TD Meloche Monnex***

---

### **Professional Development and Networking Events for Management Consultants**

The Association website includes listings of PD and networking events of interest to management consultant. Visit [www.camc.com/index.cfm?PID=12514](http://www.camc.com/index.cfm?PID=12514) to see a list of events across Canada.

**Attention CMCs: All Professional Development events are worth one point per hour towards your CPD requirements.**

---

### **Member in the news: Chris Jones FCMC**

Chris, a CMC since 1975 and FCMC since 2005, had his article Save Time, Save Money published in the March issues of Summit Magazine. Geared towards readers in the field of public sector purchasing, the article offers top 10 tips to help buyers save time and money in the RFP process.

A PDF of the article can be downloaded at

[http://www.summitconnects.com/Articles\\_Columns/PDF\\_Documents/200603\\_01.pdf](http://www.summitconnects.com/Articles_Columns/PDF_Documents/200603_01.pdf).

---

### **Eight Steps to avoid and minimize Errors & Omissions claims**

**Brought to you by LMS ProLink, a CAMC preferred partner**

#### **1. Stay within your realm of expertise.**

One of the best ways to limit your professional liability risk is to limit your services to those for which you are exceptionally well qualified. Don't be tempted to take on assignments or projects that are "out of your league" even as a favour to a friend or to satisfy a client for whom you provide other services.

**Action Step:** List the types of services you feel are your specialty. Make sure your staff is clear about what's acceptable "business" for your business. And make sure those are the only services that are outlined in any promotional material about your company.

#### **2. Clearly outline expectations before work begins.**

Consider giving your clients with a written "letter of engagement" or other formal means of outlining what services you will, and won't, be providing. Review and sign this document with your client to ensure that you share the same understanding of the work to be performed.

**Action Step:** Consider what form of "expectations management" document is appropriate for your industry. Involve an attorney who is familiar with and experienced in handling legal work in your industry, and consider whether any disclaimers, limitations of damages, and other terms are appropriate. Integrate this documentation step into your work process.

#### **3. Keep detailed client & project files.**

Make sure everyone on your staff documents every step in the process for any particular service

or project. Encourage everyone who is involved to review documentation on any previous actions, before they initiate any new ones.

**Action Step:** Review your documentation procedures. See if there are any holes in your process, and take steps to address them. Research whether any provincial or federal laws require that documents for your type of business be kept for a specific period of time.

#### **4. Review how to report a claim...before you need to.**

Before you ever need to know, you'll want to know how to handle a professional liability insurance claim. For example, you should know whether your insurance policy requires you to use a certain lawyer or whether you're free to choose your own.

**Action Step:** Review, with your LMS ProLink broker, the procedures for filing a professional liability claim. You'll also want to know when your policy requires you to report a claim or circumstances that could lead to a claim. Document these procedures and file them where you can find them easily.

#### **5. If you are ever sued, contact your LMS ProLink broker immediately.**

Remember, any communication between you and your insurance broker is "privileged," meaning he or she is legally required to keep your confidences. We will connect you with a lawyer who is an expert in handling litigation in your field of expertise. Be sure not to hold back any details, even if you think they may be unimportant, embarrassing, or incriminating. The more you tell your lawyer, the more prepared he or she will be to defend you in a professional liability case.

#### **6. Don't share your story with everyone.**

While communication with your lawyer and broker is protected, your associates can be subpoenaed to testify in a trial.

**Action Step:** Don't put your associates in an awkward position or harm your own defense. Be discrete about discussing your situation.

#### **7. Prove your innocence when possible; reduce your responsibility when necessary.**

Of course, if you're liable for the claim, you'll want to do all you can to prove your innocence. But keep in mind that how much you may have to pay in damages is often related to how responsible a judge or jury finds you. And a judgment against you may be more harmful to your business reputation than a settlement.

**Action Step:** In many cases involving disputes between parties, the defendant faces some possibility, but not a certainty, of legal culpability. Consider with counsel and your insurance company the pros and cons of any settlement opportunities.

#### **8. Don't skimp on your insurance coverage.**

This is one area where you definitely don't want to be caught short. Even a single lawsuit alleging professional misconduct can not only drain your assets, it could destroy your business. So make sure you have enough coverage.

**Action Step:** Consult an LMS ProLink broker to determine how much professional liability insurance is appropriate for your industry and your particular situation. And make sure you purchase this coverage from a highly rated insurer that will be there if and when you need assistance.

Visit <http://www.lms.ca/camc/>.

*\*\*Tips for Minimizing Professional Liability Losses\*\*, Hartford Financial Services Group, Inc.*

---

**CAMC Affinity Centre: Instant access to real savings on a wide range of brand name products and services that you use every day - at work and at home!**

Through the CAMC Affinity Centre, you can take advantage of programs from:

- Workopolis - Save 15% on every single job posting
- Grand & Toy - Exclusive 47% off office products and 20% on furniture
- HP Canada - Save up to 10% on eligible HP products
- Microsoft - Save 5%-15% off the suggested retail price of eligible products.
- GoToMyPC - Access your PC from anywhere.™
- GoToMeeting - Online meetings made easy.
- Premier Fitness (avail. in Ontario only) - 1 year Gold Membership for only \$399
- UPS - Save 10%-20% on shipping and customs brokerage
- D&B - 20% off the retail price\* and instant access to online credit reports
- Equifax - Check your Credit Report and Credit Score online -save 10%
- Mortgage Intelligence - Exclusive i-mortgages and access to over 50 lenders
- Canada News Wire -15% off CNW's NewsMaker Services
- FTD Flowers - An exclusive 15% savings on all products

To learn more about CAMC member discounts visit the CAMC Affinity Centre at <http://www.camc.com/index.cfm?PID=12948>.

---

**How to get the CMC logo**

You've worked hard to achieve the CMC designation, now it's time to tell the world! If you would like to add the CMC logo to your business card, letterhead, proposal documents, PowerPoint presentations or website, please contact Sandi Cox at [scox@camc.com](mailto:scox@camc.com). Please indicate how you intend to use the logo to ensure you receive the appropriate file type.

---

**Make your voice heard**

If you have comments about what you've read in cNotes, or have a contribution or suggestion for the Editor, we want to hear it. We can't reply to every email we receive, but we do read *all* of them and we take your opinions seriously. [Click here to send a message to the Editor](#)

---

**Visit our website**

Get more information on the world-renowned CMC designation, find a consultant, make connections in the profession. All this and more is available to you every minute of every day on the Association's website. [www.camc.com](http://www.camc.com)

---

cNotes is the newsletter of the Canadian Association of Management Consultants. We hope you find it useful and enjoyable, but if for any reason you wish to remove yourself from our mailing list, [email sgriffith@camc.com](mailto:sgriffith@camc.com).