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# cNotes

## News and Ideas for Canadian Management Consultants

November/December 2007 Edition

### A Call to Action

## Message from the Chair: Ken Davies, FCMC

It's time for CMC-Canada to fish or cut bait. After three days of meetings in late October, members of the Board, the National Certification Committee, Provincial Institute representatives, Services Committees and Chapters reaffirmed our overall strategy and clearly stated that it is time for action.

The key goals for the upcoming year fit into our three strategic objectives:

#### Connect to our Members

We will be reaching out to our members this year as never before with a special emphasis on CMC-Canada Board members attending events across the country. Events are scheduled already in December in Toronto, Calgary and Edmonton and in January in Ottawa. Future events in 2008 are being planned for Halifax and Kananaskis, Alberta.

Following the excellent work of the Leveraging Technology Task force, the CMC-Canada office is pursuing improvements to the member database

and modernizing our website to reach out to members and provide more information services.

The Saskatchewan Institute has taken on a CMC Business Case competition for 2008.

A Member Retention Task Force has been created to focus on better meeting your needs.

#### Grow membership to 5,000 CMCs

The Board's most ambitious goal is to grow aggressively (25 per cent per year for the next four years). Unless CMCs can claim to represent a critical mass of consultants across the country, it is hard to be relevant. At this time, research shows that CMCs make up roughly 10 to 15 per cent of consultants in Canada. More than 25 per cent of consultants in Canada would be a critical mass. A Growth Task Force has been created and has already engaged campaign managers to deliver 500 new members by the end of 2008.

### *Have you completed your CPD declaration?* A friendly reminder to submit by **December 31, 2007**

Filling out your CPD declaration and have questions on CPD activities or points? Click here for the complete CPD guidelines and see page six of this newsletter for more information.



## Message from the Chair Continued...

The National Certification Committee (NCC) has recommended an expansion of the oral exam process for all candidates. As well, the NCC is investigating alternatives that will further refine and streamline the certification process while maintaining its rigor and credibility.

Provincial Institutes and Chapters have been asked to identify consultants in their region who qualify for the Executive Stream. The CMC-Canada office will support this initiative and pursue these potential candidates this year.

### Promote the CMC Brand

An exciting development is the creation of the Advocacy Task Force to coordinate the efforts to promote the CMC brand across Canada. We will continue to assertively lobby the federal government to recognize the CMC designation as a

desired qualification in bidding on consulting opportunities.

There is no question that these are stretch objectives for our organization. There is also no doubt that we are at a watershed moment where our members want to understand the CMC value proposition and ensure that we are relevant. This year's goals are action oriented and easy to measure. The Board will report progress back to our members at least monthly.

I welcome all comments or questions.

Ken Davies, FCMC  
Ken@Lumina.ca

## What's New

### Management Consulting Industry Study: Update

CMC-Canada commissioned Kennedy Information to undertake a 2007 Study of the Management Consulting Industry in Canada. Results are currently being tabulated, and once again, the Member Briefing Study will be free to members – a \$395 value. Watch your mailbox for your copy, scheduled for publication in December 2007.

Overall, the state of the Canadian management consulting marketplace has changed significantly over the years — particularly since 2000. From a macro-economic perspective, the Canadian economic policy put in place some 15 years ago is now bearing tremendous fruit. The three-pronged economic policy — creating a highly diversified industrial base, encouraging political stability and establishing well-regulated financial markets — has spawned a market environment that is conducive to growth in management consulting and its five subsegments. From a supply perspective, the management

consulting marketplace has undergone massive dislocations since 2000. The early 2000 recession, coupled with the business environment after 9/11, had a major negative impact on the management consulting industry in Canada. A severe deterioration in numerous management consulting businesses was caused by the recessionary downturn, leaving many firms reeling. Such changes were not particularly evident in strategy firms or OM firms, but they had a significant negative effect on IT and BAS while HR firms suffered through the cyclic downturn.

CMC-Canada's 2007 Study of the Management Consulting Industry in Canada offers you the most current information to help you keep apace. Members will automatically receive the Member Briefing upon its publication; the full study will be available for purchase from Kennedy Information.

### **CMC-Canada Reminder: Don't Forget to Renew Your Membership Today!**

The membership renewal process has never been easier. Use the website, send a fax, give us a call or drop by in person. Questions or concerns about the renewal process? E-mail [consulting@cmc-canada.ca](mailto:consulting@cmc-canada.ca) or call 1-800-860-1515. Remember that fees are due before December 31, 2007.

## CMC-Canada Holds Annual General Meeting and Welcomes the 2007-2008 Board of Directors

On October 22 of this year, CMC-Canada held its Annual General Meeting (AGM) in downtown Toronto. The AGM followed the Industry Study Presentation and welcomed members from across the country.

During the event, Ted Stedman, FCMC, Nominations Committee Chair, presented the 2007 - 2008 slate of Directors for approval. You will find the Board of Directors listed in the photo gallery on page nine.

Greg Fieger, CMC, presented his final report as Chair, thanking Board, Task Force Members and staff for their hard work and support.

CMC-Canada's new Chairman of the Board, Ken Davies, FCMC, spoke with enthusiasm on executing key activities over the next year to support the Association's objectives of connecting to our members and consumers of consulting services; growing our membership to 5,000 CMCs in four years; promoting the CMC brand to consumers of consulting services; and sustaining the CMC-Canada organization. Ken also recognized CMC-Canada staff (pictured on page seven) and commended them on their work on behalf of the organization.

The 2007 financial statements were presented by David Bratton, FCMC, Treasurer, and approved by members. David was pleased to report the Association realized a surplus in 2007.

Finally, Mark Nesbitt, FCMC, Secretary for the International Council of Management Consulting Institutes and Past Chair of CMC-Canada, spoke on CMC-Canada's leadership role at the international



Pictured left to right: Greg Fieger, CMC, Past Chair, CMC-Canada, Ken Davies, FCMC, Chair, CMC-Canada, Tom Rodenhauer, Vice President, Consulting, Kennedy Information, Inc. and Heather Osler, President and CEO, CMC-Canada.

council in relation to certification standards and shaping the future of the international organization. He challenged attendees with the question: What role could ICMCI play – alongside setting certification standards – that would be of interest and benefit to Canada? Our organization has significant influence at the international table and we are encouraged to embrace this opportunity.

Mark also addressed global initiatives that may create value and benefit to Canada. There are transnational activities in Europe that may find their way to North America – and ICMCI may soon engage in more activity with the United Nations. Due in large part to the activities of Lynn Haight of Canada some years ago, ICMCI enjoys non-governmental organization status in the UN.

## Caribbean Institute of Certified Management Consultants Joins International Council

Over the past year, CMC-Canada has provided advice and guidance to the founding committee of the Caribbean Institute of Certified Management Consultants (CICMC), based in Barbados. In November, the International Council of Management Consulting Institutes (ICMCI) announced that CICMC has been accepted as a provisional member.

CICMC can now implement a CMC certification program and work with the international consulting community to advance the profession in the region, which includes: Antigua and Barbuda, the Bahamas, Barbados, Belize, Dominica, Grenada, Guyana, Haiti, Jamaica, St. Kitts and Nevis, Saint Lucia, Saint Vincent and the Grenadines, Suriname, Trinidad and Tobago.

## Caribbean Institute Continued...

According to Heather Osler, President and CEO of CMC-Canada, "We welcome the addition of the Caribbean Institute and salute its Founding Chair, Dennis Strong, CMC, for his enthusiasm and vision. Vice Chair, Don Wood, CMC, is a longstanding member of CMC-Ontario now living in St. Vincent and he and his wife, Betty Jane Punnett, head of Management Studies at the University of West Indies, have been pillars of strength in the realization of this initiative.

The 21st century business environment is a global one; we will continue to work with ICMCI to build a

network of countries and regions around the world with whom we can share ideas, information and best practices. The long term ROI on these partnerships for our members and those of the international CMC community will be invaluable."

CMC-Canada is a founding member of ICMCI.

Founded in 1987, ICMCI now has 43 member countries around the globe. CMC joins Brazil, USA and Canada as part of the ICMCI America's Hub. For more information, click [here](#).

## 2007 Member Survey Update

Thank you to all members who took the time to complete the 2007 Member Survey. This year, we received responses from more than 600 members. CMC-Canada's national office and board of directors are currently reviewing the feedback – and taking all comments into consideration. A summary of the survey responses will be posted on our website by the end of December. Look for it in the What's New section on the homepage, [www.cmc-canada.ca](http://www.cmc-canada.ca).

### Congratulations Ray Brillinger, CMC!

Ray completed the member survey and is the winner of an iPod Shuffle. We'll be watching for you on the subway Ray – enjoying your iTunes!

## Latin American SIG Abuzz with Outsourcing

In September 2007, the CMC-Ontario: Greater Toronto Area Chapter hosted an event for members on the benefits of outsourcing to Mexico and India. The Right Honourable Sinclair Stevens, Q.C., a former Minister of Economic Expansion in Brian Mulroney's cabinet and President of the Treasury Board in the government of Joe Clark, welcomed guests and spoke on globalization. He recognized that within our global economy, the majority of successful companies have outsourcing strategies. Attendees were encouraged to harness the power of Canada's Commonwealth connections to prosper in this new economy.

Rick Kotick, Vice President, North American Industries, and Mitchell Wine, President of Brushstrokes Fine Art Inc., spoke on the advantages of outsourcing to Mexico. They concluded the country's healthy economy, educated and skilled labour force and location make it an attractive

destination for manufacturing and R&D business units.

Radha Radhakrishnan, President, and Gerald Manuepillai, Vice President, RK Global Consultants Inc. gave an overview of India's local market, government programs available to foreign investors, and typical permits and approvals required to set up business in the country. They also discussed the advantages of manufacturing – and selling – products in India.

The evening concluded with a panel Q & A period. Members also had the opportunity to network with their peers and learn more about CMC-Canada, CMC-Ontario and the GTA Chapter.

## Members in the News

**Our members are very talented individuals, who continue to make astounding contributions to the profession and their communities. Check out their stories from the links below.**

**George B. Cuff, FCMC (Alberta)** published two books on local government - his consulting specialty for the past 30 years. The books are titled *Cuff's Guide for Municipal Leaders - Volume 1: A survival guide for elected officials* (2002) and *Cuff's Guide for Municipal Leaders - Volume 2: The case for effective governance* (2006) and have been published through Municipal World. For more information, click here.

**Len Nanjad, CMC (Ontario)** was a contributing author to *Can Two Rights Make a Wrong? Insights from IBM's Tangible Culture Approach*, published in 2006. He also had a feature profile in *Introduction to Business Information Systems, Canadian Edition*, published in 2007.

**Odilon Patrick Lemieux (Ontario)** had an article titled "High Tech M&A - Strategic Valuation" published in the *Management Decision* journal in October 2007.

**Heather McKelvey (Nova Scotia)** published *ISO 26000: How the New Standard for Social Responsibility from the International Standards Organization Will Impact the Role of the Management Consultant and the Management Consulting Industry*

in the Fall of 2007. Please see the *cNotes* article titled "How Will the New ISO Standard for Social Responsibility Impact Management Consultants?" on page seven for more information.

**Rosalyn Rubenstein, CMC (Ontario)** was featured in an article titled "Growing Pains for Little Theatre" published in the *Ottawa Citizen* in September 2007. To read the article, click here. Rosalyn also had an article titled "Better Business Plans" published in the February/March issue of *Association* magazine.

A comment by **Tony Wanless (British Columbia)** was featured in the Harvard Business School's *Working Knowledge* newsletter in an article on the "deprofessionalization" of management by business schools. For the complete article, click here.

If you have a recent success story to share with your peers, please contact [ahoddinott@cmc-canada.ca](mailto:ahoddinott@cmc-canada.ca) and it will be included in the next edition of *cNotes*.

## Congratulations CMC Recipients

The CMC designation signifies that an individual has met the industry's stringent international academic and experiential requirements. It also reflects his or her personal commitment to best practices and the highest standards in management consulting.

The following CMC-Canada members achieved their CMC designation in 2007 – since the last publication of *cNotes*:

*(new FCMCs and CMCs are listed in cNotes as designations are awarded)*

Stephen McDonald, CMC (CMC-Atlantic Canada)  
Ken Thomas, CMC (CMC-Atlantic Canada)



## Association News and Reminders

### 2008 Membership Renewals

A new website is just part of what promises to be our most exciting year – 2008.

Management consulting has never been easy, but today's demands and marketplaces continue to stretch your experience and challenge your knowledge. Your link with CMC-Canada continues to give you the best source of information – it's your forum; your Association dedicated to your needs.

Local Chapter programs and meeting with fellow consultants can play a vital role in your professional development. Watch your e-mail for notices of upcoming local events to connect with colleagues.

Whether you are already a CMC, or on the way to attaining your designation, CMC-Canada strives to meet – or even exceed – your needs.

Your membership renewal invoice was mailed the week of November 12. CMC-Canada's 2006-2007 Annual Report was also included in the package for all members, and CMCs received their CMC pin to wear with pride in the coming year.

Please remember to remit your dues before December 31 to avoid disruption of member services!

#### Renewing Could Not Be Easier

Most members use our secure online payment system. Click here for more information.

Others fax their credit card number of their invoice to 416-860-1535 or 1-800-662-2972.

We've already received cheques from some members, made out to CMC-Canada and mailed to Suite 815, 4 King St. W. Toronto, ON M5H 1B6.

Some members prefer to call us at 416-860-1515 or 1-800-268-1148 and give us their credit number over the phone.

We've been delighted to meet a few members in person, who dropped by the office to hand deliver their renewal payment and say hello.

### Continuing Professional Development Update

Certified members received their statutory declarations with the renewal mailing. You will notice a new section of the declaration which asks certified members to declare how many CPD points they have achieved for 2007. The requirement is 35, as per the new guidelines that were introduced to everyone via e-mail from Institute Presidents last December.

The guidelines, as well as a personal log through which you can keep track of your points, can be found on our website, in the members-only section (log in required), or by clicking here.

Please don't hesitate to contact Janice Schenk with questions for further information – and remember, declarations must be mailed, faxed or e-mailed in by December 31, 2007.

#### Now Available Online:

##### ***Globe and Mail* advertisement**

In October, CMC-Canada promoted the CMC designation and listed the Association's newest CMCs and FCMCs in *The Globe and Mail's Report on Business* section. Click here to see the full advertisement.

##### **Annual Report: *Ensuring a Higher Level of Management Consulting***

Learn more about how CMC-Canada advanced the profile of management consulting in Canada in our 2007 Annual Report. *Ensuring a Higher Level of Management Consulting* contains messages from Heather Osler, President and CEO, and Greg Fieger, Past Chair of the national board. Click here for the full report.

##### **CMC-Canada's Audited Financial Statements**

The Association's Financial Statements are available to members. Click here for more information.

## Spotlight on CMC-Canada National Office Staff: Meet Darlene Hoornstra, Certification and Professional Development Co-ordinator

Welcome to a new section of *cNotes* – aimed to familiarize you with individual CMC-Canada staff members, who strive to provide members a positive association experience through CMC-Canada's many member services.

Darlene Hoornstra, B.Sc.Soc. is CMC-Canada's Certification and Professional Development Coordinator. Darlene has been with CMC-Canada for close to two years and assists with Association and Institute event organization and promotion. If you are organizing an event in your province and need assistance with promoting the event to local members or with registration procedures, Darlene is your contact. She's also responsible for sending all of the Association's e-broadcasts and assisting with the administration of the certification program. In this role, Darlene answers member inquiries and tracks the progress of candidates.

Darlene has worked in events and administration for four years. Her experience includes: Conference Planner at Niagara College; Event Assistant at St. Catharines General Hospital Foundation; and Assistant Cruise Director at Seabourn and Cunard Cruiselines.

When Darlene isn't promoting events and involved in certification activities at CMC-Canada, she



Heather Osler, President and CEO of CMC-Canada, is pleased to introduce CMC-Canada staff. From left to right: Mary Blair, Manager, Membership and Administration, Helene Theberge, Membership and Marketing Co-ordinator, Audrey Hoddinott, Manager, Marketing and Communications, Janice Schenk, Manager, Certification and Professional Development and Darlene Hoornstra, Certification and Professional Development Co-ordinator.

volunteers with the Children Aids Society of Toronto, plays on a recreational volleyball team or spends time with her friends and cat, Bella. Darlene can be reached at [dhoornstra@cmc-canada.ca](mailto:dhoornstra@cmc-canada.ca) or 416-860-1515 ext. 4.

## Information Resources

### How Will the New ISO Standard for Social Responsibility Impact Management Consultants?

*CMC-Canada recently posted a new research paper on [www.cmc-canada.ca](http://www.cmc-canada.ca), authored by Heather McKelvey of St. Mary's University. The paper discusses the effects of standardizing social responsibility on the management consulting profession.*

Social Responsibility is an issue of increasing importance in the corporate world today. The International Organization for Standardization (ISO) has begun to develop ISO 26000 Social Responsibility, a guidance standard that relates to social responsibility and sustainable development.

The ISO Technical Management Board uses the title 'Social Responsibility' because it is intended to apply to all organizations not just corporations or the private sector. The creation of the ISO 26000 will have a significant impact on the entire consulting industry and will open up many opportunities for management consultants.

[Click here to read the full report.](#)

*Published as part of the Memorandum of Understanding between St. Mary's University and CMC-Canada.*

## CMC Logo Graphic and Designation Positioning Statements – Now Available on CMC-Canada’s Website!

You’ve worked hard to achieve the CMC designation and it’s time to tell the world. To add the CMC logo or the designation’s positioning statements to your business cards, letterhead, proposal documents or PowerPoint presentations – just visit [www.cmc-canada.ca](http://www.cmc-canada.ca).

We’ve created a page in the CMC Program section (members only), which houses the English and French versions of the logo, usage guidelines and positioning statements (contained within the usage guidelines). Click here to access the page.

### 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. Click here to view the listing of events. Attention CMCs! All professional development events are worth one point per hour towards your CPD requirements.

## Resource for CMCs Travelling to the US

*Some of our members have experienced difficulty with USA border issues and have benefited from the use of special advisors. One of these advisors is TN Visa Expert; representatives from the organization have submitted the following article:*

### Avoid Immigration Issues and Work in the US

The North American Free Trade Agreement (NAFTA) permits Management Consultants to work for US employers by obtaining a TN Status (commonly referred to as a TN or TN-1 visa). It is the fastest way to work in the U.S. However, since 9/11 Immigration Officers are scrutinizing immigration visa applications more carefully. Immigration Officers are skeptical of applicants who may be using the Management Consultant category simply because it is a (TN) NAFTA Occupation that does not necessarily require a degree.

To avoid these issues and successfully obtain the TN Status the applicant must:

- Meet all the TN Visa requirements
- Show the job duties are that of a management consultant
- Provide appropriate proof of documentation
- Be prepared for the border interview
- And more...

TN Visa Expert provides a Step by Step Application Kit and useful articles to obtain the TN Visa. Click here for more information.

*Members may find this information helpful, but should also visit [www.cmc-canada.ca](http://www.cmc-canada.ca) for CMC-Canada endorsed information on guidelines for entry into the US for management consultants.*

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# CMC-Canada Photo Gallery



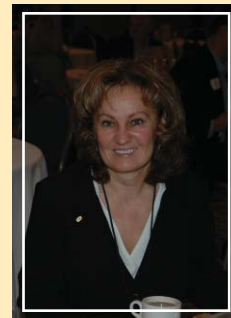
**CMC-Canada's 2007-2008 Board of Directors**, listed back to front, left to right. Bob McCulloch, FCMC, Vice Chair, David Bratton, FCMC, Member at Large, Greg Fieger, CMC, Past Chair, Richard Harris, FCMC, Treasurer, Ken Davies, FCMC, Chair, Gilles Auger, AdmA, CMC, CMC-Quebec, Blaine Atkinson, FCMC, National Certification Committee Chair, Todd Williams, CMC, CMC-Atlantic Canada, Heather Osler, CAE, President and CEO, Simon Wong, CMC, CMC-British Columbia, Randy Baldwin, CMC, CMC-Manitoba, Ingrid Pregel, CMC, CMC-Ontario, Jennifer Jennax, CMC, CMC-Alberta. Missing: Valerie Sluth, CMC, CMC-Saskatchewan, Brendan Cunneen, Public Member.



David Bratton, FCMC



Greg Fieger, CMC



Mary Colak, CMC



Allan Wilson, CMC and Gus Gillespie, FCMC



Heather Osler, CAE



Tom Atkins, CMC and Hal Ashmore

## CMC-Canada Photo Gallery *Continued*



Jean Richard, AdmA, CMC, Mary Blair, CAE,  
Heather Osler, CAE, Gilles Auger, AdmA, CMC



Bob McCulloch, FCMC, Blaine Atkinson, FCMC



Valerie Sluth, CMC



Todd Williams, CMC, Tom Rodenhauer,  
Kennedy Information Inc.



Victoria Davies, CMC-Canada member



Ted Stedman, FCMC, Simon Wong, CMC