

## CMC CANADA | ESSENTIALS OF MANAGEMENT CONSULTING

---

# COURSE OUTLINE

Created by: Christopher G. Harper, CMC. PMP, CBAP, MBA

Created: November 2, 2021

Version/Dates Updated: November 2022

*For more information, please email [events@cmc-canada.ca](mailto:events@cmc-canada.ca)*

# <sup>ii</sup> TABLE OF CONTENTS

|                                   |   |
|-----------------------------------|---|
| 1. COURSE INFORMATION .....       | 1 |
| 2. COURSE DESCRIPTION .....       | 1 |
| 3. COURSE LEARNING OUTCOMES ..... | 2 |
| 4. APPROACH TO LEARNING .....     | 2 |
| 5. ATTENDANCE & WORKLOAD .....    | 2 |
| 6. ASSESSMENT OF LEARNING .....   | 3 |
| 7. COURSE SCHEDULE .....          | 4 |

## 1. COURSE INFORMATION

**Course Title:** Essentials of Management Consulting

**Delivery Method:** Online Synchronous

**Course Duration:** The course is delivered over six sessions during a six-week period starting on May 17, 2023, ending on June 21, 2023. Classes are held via Zoom on Wednesdays from 1-4pm ET. **Final assignment is due one week after the last class.**

**Required Resources:** Participants must have access to the following:

- A computer capable of utilizing Zoom.
- High-speed internet capable of supporting video and audio communication.
- Common office productivity software such as Microsoft Word and PowerPoint.

**Attendance Considerations:** Participants must attend at least five of the six live classes. An absence of more than 30min (at any point during the class) is recorded as an absence, except in extenuating circumstances, as approved by the Learning Manager.

## 2. COURSE DESCRIPTION

Management Consulting professionals are often required to address a client's most significant challenges to create organizational value and performance opportunities. While the challenges can vary, Management Consultants have a foundational approach that enables them to bring clients through the consulting journey to realize their organization's goals.

The Essentials of Management Consulting course provides learners with the foundational approaches, skills, and techniques necessary to effectively and ethically address client challenges and deliver value. Whether an experienced practitioner looking to formalize their expertise through the Certified Management Consultant (CMC) designation; or, in pursuit of professional growth as a developing practitioner, the Essentials of Management Consulting course will equip you with a solid foundation based on industry best practices within the context of cohort-based applied learning.

The Essentials of Management Consulting course focuses on three core consulting competencies:

- Helping clients assess their current situations, including the business challenges and opportunities they can address to improve upon the present.
- Helping clients develop strategies for achieving objectives and preserving the benefit of those achievements.
- Helping clients prepare for and address the challenges of implementation.

### **3. COURSE LEARNING OUTCOMES**

By the completion of this course, successful learners will be able to:

- Define and describe the four core competencies in management consulting.
- Describe the five stages of the consulting process and how each stage relates to one another, including the inputs and outputs of each of the stages.
- Select and apply core consulting tools and techniques for each stage of the consulting process within the context of a client's circumstance.
- Demonstrate awareness of cross-functional areas, including human resources, finance, operations, information technology, marketing, and strategic planning within the context of a management consulting engagement.
- Apply appropriate change management and project management techniques during the execution of a management consulting engagement to support implementation.
- Demonstrate professional conduct within a management consulting engagement and identify common situations where professional conduct may be at risk.

### **4. APPROACH TO LEARNING**

The course uses a variety of approaches, including:

- A blended learning approach utilizes various media to improve the experience and support various learning styles. Prior to the course, learners will complete an online module.
- A case study allows you to work with a team to apply the course information and produce common work products in a management consulting engagement.
- Group work where you will work with a team to navigate the common challenges and opportunities within teamwork to address the case study.

### **5. ATTENDANCE & WORKLOAD**

Please note the following information regarding attendance and workload expectations outside of the learning environment:

- Group participation is key to success. It is necessary for learners to attend a majority of the sessions to ensure contributions to group work deliverables. As a result, it is required that a learner attend no less than 5 of the live classroom sessions.
- In addition to the asynchronous eLearnig module (1.5-3hrs), learners should expect to dedicate approximately 5 – 8 hours per week to the course. In addition to the weekly classroom learning session of 3 hours, additional group work will add another 2 – 5 hours above this.

## 6. ASSESSMENT OF LEARNING

Successful completion of the course requires the following:

| ASSIGNMENT   | VALUE     | DUE DATE   |
|--|-----------|--|
| <b>Attendance at a minimum of 5 of 6 live classes and not being absent more than 30 minutes within each class.</b> | Pass/Fail | Please see the Course Schedule section for specific dates.   |
| <b>Assignment 1: Completion of Case Study</b>  | Pass/Fail | <p><b>Week 1 - Overview</b></p> <p>Read the following case study documents:</p> <ul style="list-style-type: none"> <li>- EMC – Case Study – 0 – Overview</li> <li>- EMC – Case Study – 1 – Initial Video Call</li> </ul> <p><b>Week 2 – Entry</b></p> <ul style="list-style-type: none"> <li>- Each group prepares a 5 minute max presentation summarizing the letter of engagement.</li> <li>- Learners should be reminded to read the Week 1 case study materials if they have not done so as it is required to effectively participate in the case study.</li> </ul> <p><b>Week 3 – Diagnosis</b></p> <p>Read the following case study documents:</p> <ul style="list-style-type: none"> <li>- EMC – Case Study – 2 – Diagnosis – Bill Bauer – Master Brewer</li> <li>- EMC – Case Study – 3 – Diagnosis – Katie Neil – Marketing &amp; Events Mgr</li> <li>- EMC – Case Study – 4 – Diagnosis – Brad Schultz – Brewery Manager</li> </ul> <ul style="list-style-type: none"> <li>- Each group will prepare a 10 minute max presentation summarizing the diagnostic report.</li> </ul> <p><b>Week 4 – Action Planning</b></p> <ul style="list-style-type: none"> <li>- Each group will prepare a 10 minute max presentation summarizing the action proposals.</li> </ul> <p><b>Week 5 – Managing the Engagement</b></p> <p>Read the following case study document:</p> <ul style="list-style-type: none"> <li>- EMC – Case Study – 5 – Action Planning – Email – Canadian Craft Brewers Association</li> <li>- Each group will prepare a 10 minute max presentation summarizing the change management and project management approaches that will be used.</li> </ul> |
| <b>Assignment 2: Completion of Reflective Summary</b>  | Pass/Fail | Due within one week of course completion.<br>Deadline: June 28, 2023.  |

## 7. COURSE SCHEDULE

| DATE   | TOPIC  | LEARNING ACTIVITIES & ASSIGNMENTS   |
|--|--|---|
| <p><b>Pre-Course Activities</b></p>          | <p>Set up your computer</p> <p>Complete the SmarterU online module</p> | <ul style="list-style-type: none"> <li>▪ Ensure your computer is configured to use Zoom and that your camera and microphone are working. The instructor will log in 15 minutes before the first class to work through any technical issues.</li> <li>▪ Complete the SmarterU online learning module that will be sent to you by CMC Canada a week prior to the beginning of the course. This must be completed prior to the first class.</li> </ul>   |
| <p><b>Week 1</b><br/><b>May 17, 2023</b></p> | <p>Introduction &amp; Overview</p>                                     | <p><b>Introduction</b></p> <ul style="list-style-type: none"> <li>▪ Introductions</li> <li>▪ Review of course structure &amp; approach.</li> <li>▪ Review of requirements to complete.</li> <li>▪ Expectations of group work.</li> </ul> <p><b>Introduction to Management Consulting</b></p> <ul style="list-style-type: none"> <li>▪ Definition of management consulting.</li> <li>▪ Structure of the profession.</li> <li>▪ Competency framework &amp; Body of Knowledge</li> <li>▪ Professional conduct.</li> <li>▪ CMC Designation.</li> <li>▪ How management consulting adds value.</li> </ul> <p><b>ISO 20700</b></p> <ul style="list-style-type: none"> <li>▪ Overview of ISO 20700.</li> <li>▪ Relation of ISO 20700 to the Essentials of Management Consulting course.</li> </ul> <p><b>The Consulting Process</b></p> <ul style="list-style-type: none"> <li>▪ Introduction of the Kubr Model.</li> <li>▪ Relationship of the consulting process to tools and techniques.</li> </ul> <hr/> <p><b>HOMEWORK</b></p> <ul style="list-style-type: none"> <li>▪ Groups are assigned and encouraged to plan for week 2 group work.</li> <li>▪ Read the provided case study before Week 2.             <ul style="list-style-type: none"> <li>○ EMC – Case Study – 0 – Overview</li> <li>○ EMC – Case Study – 1 – Initial Video Call</li> </ul> </li> <li>▪ Review Entry Tools &amp; Techniques videos.</li> </ul> |

|  |  |   |
|--|--|---|
| <p><b>Week 2</b><br/><b>May 24, 2023</b></p> | <p>Entering into a Consulting Engagement</p> | <p><b>Three Elements of Management Consulting</b></p> <ul style="list-style-type: none"> <li>▪ Tools &amp; Techniques</li> <li>▪ People</li> <li>▪ Process</li> </ul> <p><b>Entering into an Engagement</b></p> <ul style="list-style-type: none"> <li>▪ Objectives, inputs, and outputs.</li> <li>▪ Tools and Techniques.</li> <li>▪ When consulting begins.</li> <li>▪ The journey to agreement.</li> <li>▪ Formalizing the agreement.</li> <li>▪ Code of conduct considerations.</li> </ul> <hr/> <p><b>HOMEWORK</b></p> <ul style="list-style-type: none"> <li>▪ Each group prepares a 5-minute max presentation summarizing the letter of engagement. The presentation will be presented at the start of Week 3. Please see page 30 of the Learner Workbook for specific presentation content guidelines.</li> <li>▪ Review Diagnosis Tools &amp; Techniques videos.</li> </ul>  |
| <p><b>Week 3</b><br/><b>May 31, 2023</b></p> | <p>Diagnosis and Communicating Findings</p>  | <p><b>GROUP PRESENTATIONS</b></p> <ul style="list-style-type: none"> <li>▪ Each group presents its presentation assignment from Week 2.</li> </ul> <hr/> <p><b>Diagnosing the Problem</b></p> <ul style="list-style-type: none"> <li>▪ Objectives, inputs, and outputs.</li> <li>▪ Tools and Techniques.</li> <li>▪ Challenges during diagnosis.</li> <li>▪ Gathering and analyzing data.</li> <li>▪ Getting to the root of the problem.</li> <li>▪ Communicating findings to the client.</li> <li>▪ Code of conduct considerations.</li> </ul> <hr/> <p><b>HOMEWORK</b></p> <ul style="list-style-type: none"> <li>▪ Read the provided case study prior to Week 3:             <ul style="list-style-type: none"> <li>○ EMC – Case Study – 2 – Diagnosis – Bill Bauer – Master Brewer</li> <li>○ EMC – Case Study – 3 – Diagnosis – Katie Neil – Marketing &amp; Events Mgr</li> <li>○ EMC – Case Study – 4 – Diagnosis – Brad Schultz – Brewery Manager</li> </ul> </li> <li>▪ Each group prepares a 10 minute max presentation summarizing the diagnosis findings. The presentation will be presented at the start of Week 4. Please see page 41 of the Learner Workbook for specific presentation content guidelines.</li> <li>▪ Review Action Planning Tools &amp; Techniques videos.</li> </ul> |

|   |                                |   |
|---|--------------------------------|---|
| <p><b>Week 4</b><br/><b>June 7, 2023</b></p>  | <p>Action Planning</p>         | <p><b>GROUP PRESENTATIONS</b></p> <ul style="list-style-type: none"> <li>▪ Each group presents their presentation assignment from Week 3.</li> </ul> <hr/> <p><b>Options Analysis &amp; Planning to Implement</b></p> <ul style="list-style-type: none"> <li>▪ Objectives, inputs, and outputs.</li> <li>▪ Tools and Techniques.</li> <li>▪ Considerations to be made.</li> </ul> <p><b>Developing Options &amp; Alternatives</b></p> <ul style="list-style-type: none"> <li>▪ Defining potential solutions.</li> <li>▪ Evaluating alternatives.</li> </ul> <p><b>Defining the Preliminary Plan</b></p> <ul style="list-style-type: none"> <li>▪ Who is involved.</li> <li>▪ Defining outcomes and activities.</li> <li>▪ Capability building for value preservation.</li> <li>▪ Constraints &amp; Enablers.</li> </ul> <p><b>Pulling it all Together</b></p> <ul style="list-style-type: none"> <li>▪ Integrating the options and preliminary plans.</li> <li>▪ Communicating the alternatives and seeking approval.</li> <li>▪ A return to the Entry Stage?</li> <li>▪ Challenges found within Action Planning.</li> <li>▪ Code of conduct considerations.</li> </ul> <hr/> <p><b>ASSIGNMENT</b></p> <ul style="list-style-type: none"> <li>▪ Each group will prepare a 10 minute max presentation summarizing the action proposals. The presentation will be presented at the start of Week 5. Please see page 52 of the Learner Workbook for specific presentation content guidelines.</li> </ul> |
| <p><b>Week 5</b><br/><b>June 14, 2023</b></p> | <p>Managing the Engagement</p> | <p><b>GROUP PRESENTATIONS</b></p> <ul style="list-style-type: none"> <li>▪ Each group presents their presentation assignment from Week 4.</li> </ul> <hr/> <p><b>Preparing for and enabling change</b></p> <ul style="list-style-type: none"> <li>▪ Models of change.</li> <li>▪ Effectively preparing for change.</li> <li>▪ Assessing the impact of change.</li> <li>▪ Critical success factors for change.</li> <li>▪ Challenges found within change.</li> </ul>   |



|   |   |  |
|---|---|--|
|   |   | <p><b>Project management and the engagement</b></p> <ul style="list-style-type: none"> <li>▪ Project management approach.</li> <li>▪ Project approach and process groups.</li> <li>▪ Estimating implementation.</li> <li>▪ Challenges found within project management.</li> </ul> <p><b>Leading the engagement team</b></p> <ul style="list-style-type: none"> <li>▪ Project management vs. project leadership.</li> <li>▪ Leadership styles and situational leadership.</li> <li>▪ Navigating leadership challenges in an engagement.</li> </ul> <hr/> <p><b>ASSIGNMENT</b></p> <p>Read the following case study document:</p> <ul style="list-style-type: none"> <li>▪ EMC – Case Study – 5 – Action Planning – Email – Canadian Craft Brewers Association</li> <li>▪ Each group will prepare a 10 minute max presentation summarizing the change management and project management approaches that will be used. The presentation will be presented at the start of Week 6. Please see page 68 of the Learner Workbook for presentation content guidelines.</li> </ul>  |
| <p><b>Week 6</b><br/><b>June 21, 2023</b></p> | <p>Implementation<br/>Termination of the Engagement</p> | <p><b>GROUP PRESENTATIONS</b></p> <ul style="list-style-type: none"> <li>▪ Each group presents its presentation assignment from Week 5.</li> </ul> <hr/> <p><b>Implementation</b></p> <ul style="list-style-type: none"> <li>▪ Objectives, inputs, and outputs.</li> <li>▪ Tools and Techniques.</li> <li>▪ Putting the plan into action.</li> <li>▪ Monitoring progress and responding to changes.</li> <li>▪ Transferring knowledge and ownership.</li> <li>▪ Navigating change during execution.</li> <li>▪ Challenges found within Implementation.</li> </ul> <p><b>Termination</b></p> <ul style="list-style-type: none"> <li>▪ Objectives, inputs, and outputs.</li> <li>▪ Tools and Techniques.</li> <li>▪ Key steps in Termination.</li> <li>▪ Challenges found within Termination.</li> </ul> <p><b>Wrap-Up</b></p> <ul style="list-style-type: none"> <li>▪ Current trends in the management consulting industry.</li> <li>▪ Reflection on course learnings and materials.</li> </ul> <hr/> <p><b>HOMEWORK</b></p> <ul style="list-style-type: none"> <li>▪ Learners will be provided with the Reflective Summary assignment.</li> </ul> |

|   |  |  |
|---|--|--|
| <p><b>Post-Course Activities</b></p> <p><b>DUE BY<br/>June 28, 2023</b></p> | <p>Course Evaluation</p> <p>Reflective Summary</p> | <p><b>Course Evaluation</b></p> <ul style="list-style-type: none"><li>▪ Please complete the course evaluation. Your feedback is essential, and we seek to improve the experience continuously.</li></ul> <hr/> <p><b>HOMEWORK</b></p> <ul style="list-style-type: none"><li>▪ Learners will complete the Reflective Summary and submit it June 28, 2023.</li></ul> |
|---|--|--|