

# CMC-Global Institute

## Certification Program Manual – July 2019



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Last Revised on July 5, 2018



Dear CMC-Global Institute Member:

Welcome to the CMC-Global Institute. We create the opportunity for management consultants anywhere in the world to obtain the prestigious CMC certification overseen by CMC-Global. (CMC-Global is the name now used by ICMCI, the International Council of Management Consulting Institutes.)

CMC-GI is an Institute associated with the International Council of Management Consulting Institutes (“CMC-Global”) - the only worldwide organization that represents the Management Consulting Professional Bodies. CMC-Global is a non-profit umbrella organization of 51 national professional bodies that together represent the nations with over 85% of the world's estimated two million management consultants. In some 50 countries of the world, the CMC designation is offered through a national Institute of Management Consultants (IMC).

Until now, this opportunity has not been available to management consultants in other parts of the world, unless special arrangements were made with an existing Institute. With the establishment of CMC-GI, management consultants anywhere in the world without an Institute of Management Consulting can become members pursue their CMC designation. Moreover, this designation offers full reciprocity, so your CMC designation will now be recognized anywhere in the world, including in countries that already have a member IMC.

Congratulations on making the choice to join forces with your fellow management consultants who are committed to our profession from around the world. By joining the CMC-GI, you will have access to a wide range of services, including:

- Professional association with other like-minded professionals around the world;
- Access to professional development activities to maintain the CMC designation;
- Access to publications of interest to management consultants;
- Access to virtual resources and training; and
- Ability to apply for and earn the CMC designation with full global reciprocity.

Please visit <http://www.cmcgi.org/> for current information and to stay connected to other Global Institute and IMC members. If you have any questions about your membership, email [membership@cmcgi.org](mailto:membership@cmcgi.org).

On behalf of our Board of Directors, and CMC-GI members, welcome! We look forward to collaborating with you in the coming years.

Regards,

Tamara Abdel Jaber, CMC  
Chairperson, CMC-Global Institute



GLOBAL INSTITUTE

## HISTORY AND MISSION: WHAT IS CMC – GLOBAL INSTITUTE?

In order to provide the opportunity for membership in countries where national Institutes of Management Consulting (IMCs) do not exist, the CMC-Global Institute (CMC-GI), was created in 2013 to be a virtual institute for management consultants.

The CMC is the internationally recognized mark of excellence in management consultancy, recognized directly in the countries covered by the Institute Members of CMC-Global and useful in all 192 member nations of the United Nations (of which CMC-Global is a Non-Governmental Organization). Through this virtual institute, any management consultant who would like to be a member of the professional management consulting profession and attain the CMC designation would be able to do so, even though there is not an IMC in her or his country. The CMC-Global Institute (CMC-GI) is a virtual organization that could be accessed via the Internet from anywhere in the world. The operating language for the virtual institute is English, and services are currently offered only in that language.

The CMC-GI mission is:

- To elevate the standards of management consulting in countries not served by national institutes.
- To assure the international community that CMCs serve their clients with world-class competency and professionalism
- To collaborate with CMC Global in supporting the creation and development of national professional management consulting institutes throughout the world
- To encourage information sharing and networking among management consultants who comply with the same CMC - GI code of conduct
- To provide services and access to services for our members. These include but are not limited to professional development, recertification, exchange of business opportunities, and mentoring and coaching.



The first step in obtaining the CMC designation is to become a member of CMC-GI. By becoming a member, you are joining an organization of peer management consultants.

Membership is also available to non-management consultants who otherwise satisfy the criteria and intend soon to become a practicing management consultant.

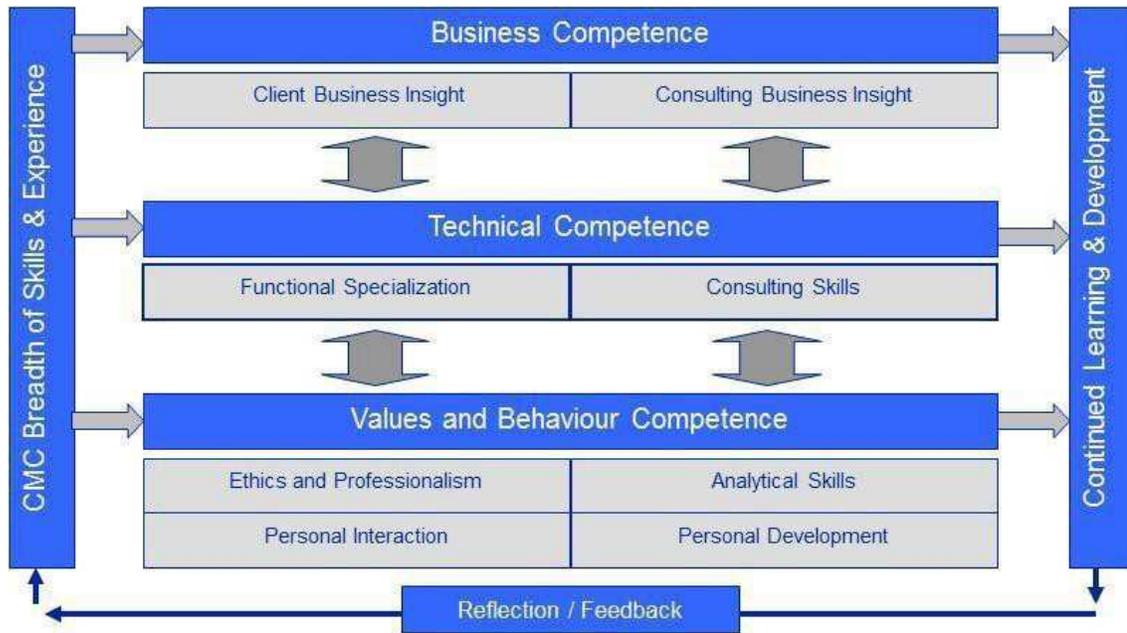
The second step is for members to complete the formal certification process as outlined below, with the desired result being granted the CMC designation. The process takes, on average, about four to six months.

## **NOTE:**

***Membership alone in the CMC-Global Institute does not provide members with the right to use the CMC designation in any way or form. Only individuals who successfully complete the certification process may use the designation.***

## CMC COMPETENCY FRAMEWORK

The CMC Competency Framework specifies the cluster of related abilities, commitments, knowledge, and skills that a management consultant must demonstrate in practice to successfully complete an assignment, *independently and unsupervised*.



### Business Competence

#### Client Business Insight

- *Understands the internal and external factors affecting the project.*

#### Consulting Business Insight

- *Understands the management consultancy environment and its commercial aspects.*

### Technical Competence

#### Functional Specialization

- *Recognized as an expert in own discipline.*

#### Consulting Skills

#### Engagement Management

- *Determines the scope of client assignments. Manages client and other stakeholders' expectations. Engages expertise of others where appropriate.*

**Assignment Management**

- *Manages client assignments effectively.*
- *Delivers timely solutions, while balancing priorities and managing time effectively.*

**Consulting Process Techniques**

- *Uses a range of techniques, including facilitation, coaching, and mentoring to deliver solutions of mutual benefit.*

**Tools and methodologies**

- *Selects and uses appropriate tools and methodologies.*

**Risk and Quality Management**

- *Defines risk criteria, identifying, mitigating, and managing risks and outcomes. Defines quality standards, ensuring quality of delivery and client satisfaction.*

**Values and Behavior Competence**

**Ethics and Professionalism**

- *Operates with professionalism and integrity in all aspects of role including conduct, adhering to codes of practice, and working in the best interests of the client.*

**Analytical Skills**

- *Applies analytical and proactive thinking to ensure robust and appropriate client solutions.*

**Personal Interaction**

- *Takes and maintains responsibility for actions and impact of selected course of action on others. Handles complexity in the operating environment.*
- *Interacts effectively with others to achieve desired outcomes. Demonstrates influencing skills. Demonstrates communication skills.*

**Personal Development**

**Continued Learning and Development**

- *Plans self-development and shows record of accomplishment of personal growth.*

## CERTIFICATION REQUIREMENTS AND PROCESS



CERTIFIED MANAGEMENT CONSULTANT

A Certified Management Consultant is a member who has successfully completed all requirements for earning the designation of “CMC”, consistent with the CMC-GI’s standards.

- A Certified Management Consultant may use the designation “CMC” or “Certified Management Consultant” after their name and accompanying logos, as approved by CMC-GI; and
- May participate in all activities of CMC-GI, including serving on boards and committees, as duly appointed.

A CMC Member must prove him/herself to be a member in good standing when transferring from one jurisdiction to another. A CMC must maintain the CMC designation by fulfilling all the following criteria:

- Be primarily engaged in the practice of Management Consulting;
- Abide by the [Code of Professional Conduct](#);
- Comply with and be current in reporting all requirements for Continued Professional Development (CPD) activity and maintain a record of such activity in accordance with the guidelines; and
- Be up to date on the payment of all membership and other fees, as established.

The following outlines the minimum requirements to support a CMC application:

- **Education and Professional Designations**: possess a recognized undergraduate degree and/or suitable academic preparation.  
Clear, scanned copies of all degrees and professional designations must be provided with the application.
- **Experience**: a minimum of three years’ experience in the practice of management consulting.
- **Time spent**: demonstrating that in the last three years, management consulting has been a significant part of the consultant’s work.  
This can include consulting with clients, managing and/or supporting consulting activities; preparing for and teaching consultancy; publishing and writing on consulting, etc.  
Applicants will be required to demonstrate this experience.
- **Independence**: Management consultants are expected to provide their services with complete objectivity and independence and must be free of (or appropriately manage) any conflict of interest in their work.

**The Four Steps to become a Certified Management Consultant (CMC) are as follows:**

**Step 1: Apply for CMC-Global Institute membership, if you are not currently a member.**

- Complete the membership application form, including signing your agreement with the [CMC-GI’s Code of Professional Conduct](#). (See Appendix II for the application form).
- Include a current resume/CV outlining your educational and work experience. Your CV must clearly demonstrate your management consulting experience.
- Include payment of your annual membership fee, pro-rated based on the month in which you join. The membership fee is based on the World Bank classification of the country reflecting economic indicators.



- The membership fee includes a 10% non-refundable application fee. Should your membership be declined, your membership fee will be refunded, less the application fee.
- Candidates may reapply by following the same process and, if declined again, must pay another application fee.
- Candidates declined for membership two successive times will not be allowed to apply a third time for six months.
- Candidates are responsible for ensuring their application form and resume are accurate and complete, and adequately reflect their specific experience and expertise.

## **Step 2: Begin Process for CMC Certification**

### **Experience Declaration Form:**

Once you have been approved as a member of CMC-GI, you can apply for the CMC designation pathway. After being approved, you must complete the requirements for formal certification as a CMC. The Registrar or designates will ensure the accuracy of all submitted information.

### **Engagement Summaries:**

Candidates must complete and submit a minimum of three written Engagement Summaries detailing recent consulting projects in which they have been involved. A template for the development of Engagement Summaries is located in Appendix III.

The Registrar may ask for additional engagement summaries. There is no provision to exempt the requirement for engagement summaries.

### **Proof of Education:**

Your resume and application form must clearly document your educational background and preparation.

The Registrar or designate *may* require proof of your education, including university transcripts.

### **Client References:**

Candidates must submit the names and contact information of three client references based on their Engagement Summaries. These clients will be contacted to complete an online questionnaire that independently confirms your consulting skills, competencies and abiding by the CMC Code of Conduct.

The client provides these references directly to CMC-GI. The Registrar or designate may ask for additional client references.

Assessors will only accept references directly from clients, associates, educational institutions, or other individuals - not from the applicant's family members or relatives.

### **Pre-Certification Courses:**

Depending on their experience and background, candidates will be required to complete entry-level courses in Ethics, Essentials/ Fundamentals of Management Consulting, and others (e.g., Project Management, Inter-Personal Skills) at the Registrar or designate's discretion. The cost for any required additional coursework will be in addition to the basic certification fee.

**\*\* Note:** The certification fees include approximately € 200 to complete the mandatory Fundamentals/Ethics course prior to being considered for the CMC designation.

### Step 3: Oral Assessment

Two qualified assessors will conduct the oral assessment. Assessors will ask candidates to demonstrate their competence relative to the Competency Framework (Appendix I) and their Engagement Summaries.

Because of CMC-GI's international structure, the assessment will usually be conducted virtually (e.g., Zoom, Skype, WebEx or GoToMeeting). The operating language of CMC-GI is English. CMC-GI will always attempt to match assessors with candidates in the candidate's mother tongue if possible. If this is not possible, the candidate can provide a translator, from their preferred language to English.

The Registrar's decision, based on the Assessors and Certification Committee's recommendation, is final. The Registrar's decision may be appealed to the Certification Appeal Committee. (Please contact [membership@cmcgi.org](mailto:membership@cmcgi.org) ).

Candidates that fail the Oral Assessment will be restricted from re-applying for three months and will again be required to pay the full oral assessment fee.

### Confidentiality

The assessors will review the candidate's materials to ensure the quality of management consulting services being provided.

In a face-to-face meeting, the candidate may bring the materials to the assessment, and then take them away. In a web-based meeting, the candidate may send PDF versions of the material that will be deleted after the session, or a screen sharing approach may be taken. The assessor and the candidate will resolve this to their mutual satisfaction.

### Step 4: CMC Designation Documents Reviewed

Near the end of the process, the Certification Committee will recommend to the Registrar whether the candidate should be granted the CMC designation. The Registrar will then advise the candidate.

## MAINTAINING THE CMC DESIGNATION

All CMC Members must comply with CMC-GI's Continued Professional Development (CPD) requirements and report annually, at the time of annual membership renewal.

The re-certification model's approach reflects minimum standards established by the International Council of Management Consulting Institutes ("CMC-Global").

The requirements for re-certification provide a tool for the consultant to demonstrate to potential clients their strong commitment and continuous effort to increase their professional knowledge and consulting ability. Specifically, the re-certification model:

- Provides evidence of a commitment to continuous improvement and enhancement of professional knowledge and skills;
- Ensures a commitment to excellence;
- Upholds the quality and integrity of the CMC designation; and
- Enhances the international recognition of the CMC designation.

This *Re-certification Process* includes submission of:

- Confirmation of CPD points assigned for specific activities including projects undertaken, continued education, professional activities, and volunteer work within the occupation;
- Listing of management consulting projects undertaken during the previous 12 months; and
- Formal adherence to CMC-GI's Code of Professional Conduct.

Additional considerations:

- If the CMC cannot provide adequate confirmation of Continued Professional Development, CMC-GI will require a structured interview and/or any other recertification technique deemed appropriate.
- Failure to comply with the demonstration of continued professional development and appropriate skills and expertise may result in potential suspension/non-renewal of CMC status, and eventually, loss of the designation.
- Candidates who wish to transfer from another Institute and/or have not pursued recertification after up to a three year absence must consult with the Registrar to demonstrate their level of professional development activity. If they have not recertified within the past five years, they must complete the certification process again.

### Fees

- CMCs are required to timely payment their fees in a timely manner and participate in and ongoing professional development in order to maintain their CMC designation.
- CMC-GI has a fee schedule based on the World Bank classification of a country based on economic indicators.
- All fees are paid using bank transfer. Bank transfer details are provided on the application, and the payment will be securely processed by CMC-GI.
- **\*NOTE: Information on mandatory training fees for recertification will be provided after you obtain the CMC designation.**



## APPENDIX I: CODE OF CONDUCT

### Serving the Interests of Clients

- 1.1. Engaging in projects only that are in the best interests of the client and avoiding the encouragement of unrealistic client expectations.
- 1.2. Ensuring that the scope, deliverables, timings and costs of consulting support are clear and agreed before starting work.
- 1.3. Carrying out assignments effectively and with due care.
- 1.4. Maintaining communication with the client and keeping the client adequately informed on assignment progress.
- 1.5. Providing sound advice and guidance to clients.
- 1.6. Refraining from inviting client's employees to consider alternative employment with them without the client's express permission.

### Transparency of Representation

- 1.7. Being open and honest about qualifications, skills and experience, and only accepting work that they are competent to perform.
- 1.8. Declaring to the client any factors that may affect their independence or objectivity – such as commission payments or other remuneration from a third party in connection with recommendations to the client, or financial interest in any goods or services which form part of those recommendations.
- 1.9. Identifying and disclosing to the client any conflicts of interest and resolving these with the client.
- 1.10. Specifying and agreeing with the client any work to be sub-contracted and ensuring that sub-contracted consultants abide by the same code of conduct as the consultant.

### Professional Behavior

- 1.11. Treating client information as confidential and respecting the confidentiality of information from any source.
- 1.12. Neither taking personal advantage from privileged information gathered during an assignment, nor enabling others to do so.
- 1.13. Acting with courtesy and respect to clients, employees and professional colleagues.
- 1.14. Assuring that personal conduct does not call into question whether the consultant is a fit and proper person to carry on the profession of management consulting.

### Definition of Professional Conflict of Interest

It is imperative that management consultants undertake their work with complete objectivity, full independence, and the provision of impartial advice. At no time should they risk a real or apparent conflict of interest with the work they undertake and/or the services they provide. At all times the interests of their client must be paramount.

Consultants may be in a conflict of interest situation when a private or personal interest could improperly influence their objective and impartial judgment in the practice of their profession. A conflict of interest may also be present when such benefits extend to family, associates, friends, and/or associates/employers.

The presence of a conflict of interest could include:

- Providing biased professional advice to a client in order to obtain from that client any financial or other tangible benefit for the consultant, a relative, or an affiliate and thereby placing the consultant in a position where his/her own interests could prevail over that of the client;
- Providing advice with consideration for future benefits or work to the consultant, his/her family, associates and/or his/her own corporate interests;
- Undertaking an assignment that, by its nature, may be in conflict with another assignment where the consultant is engaged and where the potential conflict arising from this situation has not been disclosed to both clients.



**APPENDIX II: CMC-GI MEMBERSHIP APPLICATION FORM**

**APPLICATION FORM FOR MEMBERSHIP TO CMC-GLOBAL INSTITUTE**

Thank you for your interest in joining the global community of management consultants in CMC-Global Institute and pursuing the CMC (Certified Management Consultant) designation.

**Step 1: Apply for membership into CMC-GI**

Complete this application form and submit it to [membership@cmcgi.org](mailto:membership@cmcgi.org) with all attachments.

Upon receipt of application, you will receive an invoice for membership fees.

**Step 2: Remit annual membership fee to CMC-GI**

Upon receipt of membership fee, your application will be reviewed and will be accepted or rejected.

**Step 3: Pursue CMC certification (note: CMC-GI membership is a pre-requisite to CMC certification)**

If prior CMC certification is held, its validity will be confirmed.

If no prior CMC certification is held or valid, begin the CMC certification process.

**Prerequisites for Membership in CMC-GI:**

- Management consulting experience: Submission of an accepted resume documenting education, work history and Management Consulting experience.
- Education: possessing a recognized degree or professional qualification, or five consecutive years in recognized management consulting in lieu of a degree.
- Demonstrated understanding of the management consulting profession: Please refer to the CMC-GI Occupational Competencies at [www.cmcgi.org](http://www.cmcgi.org).
- A commitment to not use the CMC designation until such time that you have received the designation.
- A commitment to ensure all professional activities follow [CMC-GI’s Code of Professional Conduct](#).

**Applicants must also attach a current CV/Resume highlighting their Management Consulting experience.**

**Application must be completed in full in order to be processed. Please print clearly.**

APPLICANT			
Preferred Salutation Mr. <input type="checkbox"/> Miss <input type="checkbox"/> Ms. <input type="checkbox"/> Mrs. <input type="checkbox"/> Dr. <input type="checkbox"/> Other _____	Date of Birth: MM/DD/YY / /	Male <input type="checkbox"/>	Female <input type="checkbox"/>
Surname	Given Names		
E-mail address #1	E-mail address #2		
Social Media:			
LinkedIn:	Facebook:	Twitter:	
Company	Company Street Address		
City	Province/State	Code	Country
Business Telephone	Web site:		



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# of Management Consultants in your firm: 1 <input type="checkbox"/> 2-10 <input type="checkbox"/> 11 - 25 <input type="checkbox"/> 26 - 50 <input type="checkbox"/> 51+ <input type="checkbox"/>	Years Working Here:
Your Title	Your <u>specific duties</u> consistent with the independent role of a Management Consultant:

Residence Address:				
City:	State:	Code	Country	Residence Telephone:

Language Preference:			
Please rate your language preference (1,2,3) among the following languages:	English:	Romanian:	Russian:

FORMAL EDUCATION: DEGREE(S) CONFERRED		
University	Degree	Graduation date

PROFESSIONALLY RECOGNIZED CERTIFICATIONS		
Association/Institute	Designation Earned	Completion Date

Name of Previous Employers	Nature of Business	From: Mo/Yr	To: Mo/Yr
1.			
<b>Role/Position: Please be specific in your role and duties.</b>			
2.			
<b>Role/Position: Please be specific in your role and duties.</b>			

**MANAGEMENT CONSULTING EXPERIENCE AS DEFINED BY CMC- GI**  
**PLEASE NOTE:** The practice of management consulting extends beyond the role of agent, representative, or advisor and entails working INDEPENDENTLY, OBJECTIVELY AND DIRECTLY WITH clients on DISTINCT PROJECTS to provide advanced diagnostic and analytical services in response to specific challenges. Services may across multiple functional areas and result in the development and implementation of strategies that support organizational change and growth. Such projects are distinct from the activities undertaken to support defined and ongoing employment duties, including support roles within an organization.

How many years have you been active as a **FULL TIME** management consultant?  
 I am new to the occupation     1-2 years     3-5 years     6-10 years     11-15 years     >15 years

What is your understanding of the Management Consultant Profession?



Why you wish to join CMC-GI?	
What are your primary areas of practice (specialties)?	
What types of clients do you serve (sectors / industries)?	

**(Most Recent) MANAGEMENT CONSULTING EXPERIENCE**

<b>Name and Address of Client</b> 1.	<b>Project Name:</b>
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*Role/Function* Please be specific in outlining your individual consulting assignments, accountabilities, and deliverables.

<b>Project Start Date: Mo/Yr</b>	<b>Project End Date: Mo/Yr</b>	<b>Total Project Hours:</b>
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<b>Name and Address of Client</b> 2.	<b>Project:</b>
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*Role/Function* Please be specific in outlining your individual consulting assignments, accountabilities, and deliverables.

<b>Project Start Date: Mo/Yr</b>	<b>Project End Date: Mo/Yr</b>	<b>Total Project Hours:</b>
----------------------------------	--------------------------------	-----------------------------

<b>Name and Address of Client</b> 3.	<b>Project:</b>
---	-----------------

*Role/Function* Please be specific in outlining your individual consulting assignments, accountabilities, and deliverables.

<b>Project Start Date: Mo/Yr</b>	<b>Project End Date: Mo/Yr</b>	<b>Total Project Hours:</b>
----------------------------------	--------------------------------	-----------------------------

**DECLARATION**

I, \_\_\_\_\_, hereby declare that:

I can demonstrate that I have been working as a management consultant since \_\_\_\_\_ consistent with the occupational competencies outlined for the profession and during that time I have devoted at least two-thirds of my working time solely to the professional practice of management consulting as defined by CMC- GI.

**OR**

I have no experience as a management consultant. It is, however, my goal to pursue a full time occupation as a management consultant as defined by CMC- GI.

*I also declare that, as a member of CMC-GI, it is my intent to undertake all requirements to support my application in securing the CMC designation. I have read CMC-GI's Code of Professional conduct and understand it. I agree to abide by this code and confirm all commitments and statements outlined herein.*



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*I will not use the CMC designation until such time that I have received that certification.*

I acknowledge that all information provided herein is complete, accurate and can be verified through formal records.

*Signed*

*Date*



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**PRIVACY**

- I want to have my contact information listed on the searchable website database.
- I do not want to receive information from third parties

Please note you may change this at any time via the member's section of the website or contacting CMC-Global Institute directly. Questions, concerns or complaints regarding the collection of personal information should be directed to the Privacy Officer, CMC-GI, [membership@cmcgi.org](mailto:membership@cmcgi.org)

Please send this completed form, together with required attachments to: [membership@cmcgi.org](mailto:membership@cmcgi.org) or postal mail to:

**CMC-Global Institute**  
Secretariat: C/O Maurer & Stager AG  
Fraumünsterstrasse 17/Postfach 318  
CH – 8024 Zurich

## ANNUAL MEMBERSHIP FEES and FEE SCHEDULE

CMC-GI has a stratified fee structure, established based on the purchasing power parity gross national income per capita for each country using the World Bank data <http://data.worldbank.org/country>. Country categories for the fee structure (based on World Bank economic indicators) are listed below.

The annual fees shown below are effective January 2018, based on the country category are:

Country Category	Membership Fee (Non-CMC) (Euro)	Membership Fee (CMC) (Euro)	Certification Fee (Euro)
Level 6	300	400	650
Level 5	250	300	550
Level 4	200	250	450
Level 3	150	200	350
Level 2	100	150	250
Level 1	60	100	150

Pro-rata is applied to the fees based on the month that membership starts.

The following percentages were used to calculate the fees depending on the fees category:

- Level 6 100%
- Level 5 Countries between 75% and 85%
- Level 4 Countries between 63% and 69%
- Level 3 between 50% and 54%
- Level 2 between 33% and 38%
- Level 1 Countries between 20% and 25%

**Membership Fee (Non-CMC) (Euro)**

Month of Application	Level 6 Country Fee	Level 5 Country Fee	Level 4 Country Fee	Level 3 Country Fee	Level 2 Country Fee	Level 1 Country Fee
January	300	250	200	150	100	60
February	275	229	183	138	92	55
March	250	208	167	125	83	50
April	225	188	150	113	75	45
May	200	167	133	100	67	40
June	175	146	117	88	58	35
July*	450	375	300	225	150	90
August*	425	354	283	213	142	85
September*	400	333	267	200	133	80
October*	375	313	250	188	125	75
November*	350	292	233	175	117	70
December*	325	271	217	163	108	65

\*Includes membership extended to December 31<sup>st</sup> the following year

**Membership Fee (CMC) (Euro)**

Month of Application	Level 6 Country Fee	Level 5 Country Fee	Level 4 Country Fee	Level 3 Country Fee	Level 2 Country Fee	Level 1 Country Fee
January	400	300	250	200	150	100
February	367	275	229	183	138	92
March	333	250	208	167	125	83
April	300	225	188	150	113	75
May	267	200	167	133	100	67
June	233	175	146	117	88	58
July*	600	450	375	300	225	150
August*	567	425	354	283	213	142
September*	533	400	333	267	200	133
October*	500	375	313	250	188	125
November*	467	350	292	233	175	117
December*	433	325	271	217	163	108

\*Includes membership extended to December 31<sup>st</sup> the following year

## Fee Structure Country Categories

Country	Category
Abkhazia	Please contact membership@cmcgi.org
Afghanistan	Level 2
Albania	Level 3
Algeria	Level 3
American Samoa	Level 2
Andorra	Please contact membership@cmcgi.org
Angola	Level 2
Argentina	Level 4
Armenia	Level 3
Azerbaijan	Level 4
Bahrain	Level 5
Belarus	Level 4
Belgium	Level 6
Benin	Level 2
Bhutan	Level 3
Bolivia	Level 3
Bosnia and Herzegovina	Level 3
Botswana	Level 4
Brunei Darussalam	Level 6
Burkina Faso	Level 2
Burundi	Level 1
Cabo Verde	Level 3
Cambodia	Level 2
Cameroon	Level 2
Central African Republic	Level 1
Chad	Level 2
Chile	Level 4
Colombia	Level 3
Comoros	Level 1
Congo, Dem. Rep.	Level 1
Congo, Rep.	Level 2
Costa Rica	Level 4
Cote d'Ivoire	Level 2
Cuba	Level 2
Denmark	Level 6
Djibouti	Level 2
Ecuador	Level 3
Egypt, Arab Rep.	Level 3
El Salvador	Level 3



Equatorial Guinea	Level 4
Eritrea	Level 1
Estonia	Level 5
Ethiopia	Level 1
Faeroe Islands	Level 5
Fiji	Level 3
France	Level 5
French Polynesia	Please contact <a href="mailto:membership@cmcgi.org">membership@cmcgi.org</a>
Gabon	Level 4
Gambia, The	Level 2
Georgia	Level 3
Ghana	Level 2
Greece	Level 5
Greenland	Please contact <a href="mailto:membership@cmcgi.org">membership@cmcgi.org</a>
Guam	Please contact <a href="mailto:membership@cmcgi.org">membership@cmcgi.org</a>
Guatemala	Level 3
Guinea	Very Level 2
Guinea-Bissau	Very Level 2
Haiti	Level 2
Honduras	Level 2
Iceland	Level 6
Indonesia	Level 3
Iraq	Level 4
Isle of Man	Level 6
Kenya	Level 2
Kiribati	Level 2
Democratic Republic of Korea	Please contact <a href="mailto:membership@cmcgi.org">membership@cmcgi.org</a>
Kuwait	Level 6
Lao PDR	Level 2
Latvia	Level 4
Lebanon	Level 4
Lesotho	Level 2
Liberia	Level 1
Libya	Level 4
Liechtenstein	Level 6
Luxembourg	Level 6
Macao SAR, China	Level 6
Madagascar	Level 1
Malawi	Level 1
Malaysia	Level 5
Maldives	Level 3
Mali	Level 1
Malta	Level 5
Marshall Islands	Level 2

Mauritania	Level 2
Mauritius	Level 4
Mexico	Level 4
Micronesia, Fed. Sts.	Level 2
Moldova	Level 2
Monaco	Level 6
Mongolia	Level 3
Montenegro	Level 4
Morocco	Level 3
Mozambique	Level 1
Nagorno-Karabakh Republic	Please contact <a href="mailto:membership@cmcgi.org">membership@cmcgi.org</a>
Namibia	Level 3
Nepal	Level 2
New Caledonia	Level 5
Nicaragua	Level 2
Nigeria	Level 2
Northern Cyprus	Please contact <a href="mailto:membership@cmcgi.org">membership@cmcgi.org</a>
Northern Mariana Islands	Please contact <a href="mailto:membership@cmcgi.org">membership@cmcgi.org</a>
Oman	Level 5
Pakistan	Level 2
Palau	Level 4
Palestine	Please contact <a href="mailto:membership@cmcgi.org">membership@cmcgi.org</a>
Papua New Guinea	Level 2
Paraguay	Level 3
Peru	Level 3
Poland	Level 4
Portugal	Level 5
Qatar	Level 6
Rwanda	Level 2
Sahrawi Arab Democratic Republic	Please contact <a href="mailto:membership@cmcgi.org">membership@cmcgi.org</a>
Samoa	Level 2
San Marino	Level 6
Sao Tome and Principe	Level 2
Saudi Arabia	Level 6
Senegal	Level 2
Seychelles	Level 5
Sierra Leone	Level 2
Sint Maarten (Dutch part)	Please contact <a href="mailto:membership@cmcgi.org">membership@cmcgi.org</a>
Slovak Republic	Level 5
Slovenia	Level 5
Solomon Islands	Level 2
Somalia	Level 1
Somaliland	Please contact <a href="mailto:membership@cmcgi.org">membership@cmcgi.org</a>
South Ossetia	Please contact <a href="mailto:membership@cmcgi.org">membership@cmcgi.org</a>

South Sudan	Level 2
Spain	Level 5
Sri Lanka	Level 3
Sudan	Level 2
Swaziland	Level 3
Syrian Arab Republic	Level 2
Tajikistan	Level 2
Tanzania	Level 2
Timor-Leste	Level 2
Togo	Level 1
Tonga	Level 2
Transnitria	Please contact <a href="mailto:membership@cmcgi.org">membership@cmcgi.org</a>
Tunisia	Level 3
Turkmenistan	Level 4
Tuvalu	Level 2
Uganda	Level 2
United Arab Emirates	Level 6
Uruguay	Level 4
Uzbekistan	Level 2
Vanuatu	Level 2
Venezuela, RB	Level 4
Vietnam	Level 2
West Bank and Gaza	Level 2
Yemen, Rep.	Level 2
Zambia	Level 2
Zimbabwe	Level 2

For more information about membership in CMC-GI, please visit our website  
<http://www.cmcgi.org/>

**CMC-Global Institute**

Secretariat: C/O Maurer & Stager AG  
Fraumünsterstrasse 17/Postfach 318  
CH – 8024 Zurich

**APPENDIX III: GUIDELINES FOR PREPARING ENGAGEMENT SUMMARIES**

CMC candidates are required to submit three written summaries based on three consulting engagements they have conducted in the past three years. These engagement summaries are used to demonstrate the candidate’s management consulting experience and will be used as a basis for the Oral Assessment.

A client reference for each Engagement Summary must be included, as these clients will be contacted to provide a reference for the candidate. Each written summary should be approximately four (2-4) pages in length. It is **strongly recommended** that these section headings be used in each summary to facilitate the review process.

<b>Candidate Name and Membership #</b>	
<b>Engagement Name, Dates &amp; Size</b>	Identify each project’s name, its start and end dates, and its size (in terms of total hours or fees). Indicate the industry and context of the engagement.
<b>Candidate’s Specific Role</b>	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.
<b>Objective(s) of the Engagement</b>	List both the project’s overall objectives and specifically what you planned to achieve in your role.
<b>Methodology Used</b>	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.
<b>Results vs. Objective(s)</b>	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.
<b>Client Liaison</b>	Who was your contact(s) in the client organization? Include their title and role on the project. How frequent was the contact? What was the nature of the contact?
<b>Demonstration of Independence</b>	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?
<b>Professional Development:</b>	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 that would ultimately benefit future clients? How have you applied that knowledge to subsequent engagements? <i>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-GI Competency Framework).</i>
<b>Barriers and Challenges</b>	What were some of the specific challenges you encountered and how did you respond and resolve the situation successfully?

**APPENDIX IV: CMC-GI COMPETENCY FRAMEWORK**

Competence Framework Reference			
A Business Competence		Sub-competence	Definition
<b>A1</b>	<b>Client Business Insight</b>		<i>Understands the internal and external factors impacting on the project</i>
A1.1	Client understanding		Researches and understands the client business, the sector in which it operates, and its stakeholders.
A1.2	Client business knowledge		Analyses business culture, structure, processes, management and performance criteria based on scope of work and at an appropriate level to be able to complete the assignment.
<b>A2</b>	<b>Consulting Business Insight</b>		<i>Understands the management consultancy environment and its commercial aspects</i>
A2.1	Consultancy business knowledge		Understands the nature of the management consultancy market, competitors and capabilities.
A2.2	Commercial aspects of assignments	A2.2.1	Demonstrates understanding of commercial aspects of projects including scoping, pricing, risk, and terms and conditions.
		A2.2.2	Demonstrates understanding of, and where appropriate uses, systematic methods to promote consultancy services for external and internal clients, to maintain a pipeline of opportunities and to negotiate and win contracts.
<b>A3</b>	<b>External awareness</b>		<i>Formulates analysis for client including the current political, economic, social, technological, legal and environmental factors that may influence the assignment.</i>

Competence Framework Reference			
B	Technical Competence	Sub-competence	<i>Recognized as an expert in own discipline</i>
B1	<b>Functional Specialisation</b>		Shows evidence of at least one year's management consulting experience in the declared primary functional specialism PLUS: <ul style="list-style-type: none"> <li>• A degree or professional qualification in the functional specialism, OR</li> <li>• At least four years' years specialized work experience in the functional specialism.</li> </ul>
B2	<b>Sectorial knowledge and experience</b>		Demonstrates how functional expertise has been applied in at least one business sector.
B3	<b>Analytical Skills</b>		<i>Applies analytical and pro-active thinking to ensure robust and appropriate client solutions</i>
B3.1	Problem solving		Uses a logical, coherent and consistent approach to problem solving. Challenges assumptions and probes detail.
B3.2	Decision making and recommendation		Understands the implications of different courses of action Makes recommendations based on risk analysis with facts and assesses the ability of the client to implement.
B3.3	Innovation		Demonstrates flexibility, creativity and innovation in generating solutions and recommendations.

Competence Framework Reference			
C	Consulting Competence	Sub-competence	Definition
<b>C1</b>	<b>Consulting Process &amp; Practice</b>		<i>Uses a range of techniques, including facilitation, coaching and mentoring to deliver solutions of mutual benefit</i>
C1.1	Presentation		Uses presentation tools and techniques effectively.
C1.2	Written reports		Produces clear client correspondence and reports selecting most appropriate style to achieve desired outcome.
C1.3	Facilitation		Manages group processes to achieve desired outcomes, using facilitation tools and techniques to maximise the group's decision-making potential.
C1.4	Coaching		Where appropriate, demonstrates use of a process to enable client learning and development to occur and performance to improve. Demonstrates knowledge and understanding of the variety of styles, skills and techniques that are appropriate to the context in which the coaching takes place.
C1.5	Mentoring		Where appropriate, demonstrates how personal knowledge and experience has been passed on to help client personnel make significant transitions in knowledge, work or thinking in order to aid their personal development.
C1.6	Consensus building		Demonstrates skills in building consensus and managing conflict.
C1.7	Collaborative working	C1.7.1	Works effectively in a team with others and seeks support from others if appropriate.
		C1.7.2	Demonstrates, if in a management role, the management, development and appraisal of others and delegation of tasks.
<b>C2</b>	<b>Engagement Management</b>		<i>Determines the scope of client assignments. Manages client and other stakeholders' expectations. Engages expertise of others where appropriate. Manages client engagements effectively. Delivers timely solutions while balancing priorities and managing time effectively.</i>
C2.1	Managing successful outcomes		Manages client assignments successfully, ensuring that objectives, deadlines and budgets are agreed and delivered on time.
C2.2	Planning		Demonstrates competent use of planning tools and techniques, and sets milestones appropriate for the size and scale of the assignment.
C2.3	Managing the engagement	C2.3.1	Shows flexibility and adaptability to changing demands and deadlines.

Competence Framework Reference			
C	Consulting Competence	Sub-competence	Definition
			Demonstrates ability to manage ambiguity.
		C2.3.2	Keeps 'big picture' in focus but addresses detail and balances priorities.
		C2.3.3	Manages own time effectively to meet deadlines.
		C2.3.4	Where appropriate, demonstrates the ability to identify, develop, describe and allocate work streams for others to meet objectives, deadlines and budgets.
C2.4	Working on all phases of project		Operates competently in all areas of project delivery from offering through to closure. (throughout the consulting lifecycle)
C2.5	Managing handover to client		<p>Anticipates handover issues and addresses them during engagement.            Agrees handover process with client (e.g. skills transfer, implementation, sustainability, knowledge documentation).</p> <p>If withdrawing because the consultant cannot complete the assignment, offers the client recommendations on other resources that can complete the project.</p>
<b>C3</b>	<b>Client Focus</b>		Understands client requirements, manages the client interface and seeks solutions in partnership with the client.
C3.1	Scoping client requirements	C3.1.1	Understands and defines client requirements as evidenced by client agreement.
		C3.1.2	Where appropriate, presents clear comprehensive written proposals.
		C3.1.3	Engages the client in selecting, and taking ownership of, options for the structure and execution of the assignment.
C3.2	Managing client interface		<p>Manages client, and consultancy stakeholder, expectations -</p> <ul style="list-style-type: none"> <li>• Complies with contractual terms</li> <li>• Conducts regular assignment reviews with client</li> <li>• Obtains client agreement if the scope of work changes.</li> </ul>
C3.3	Partnering and networking	C3.3.1	Understands and engages expertise of others alongside own
		C3.3.2	Leverages network effectively to research and define client issues, generate innovative solutions for clients and/or inform the delivery solution.
<b>C4</b>	<b>Knowledge Management</b>		<i>Captures, shares and applies knowledge in a structured way relevant to the engagement needs</i>

Competence Framework Reference			
C	Consulting Competence	Sub-competence	Definition
C4.1	Using a logical process approach to capturing and building knowledge		Gathers, records and analyzes data and information through ordered and logical processes and translates data into useable output.
C4.2	Sharing knowledge and experiences with others		Shares acquired knowledge and experience with others in appropriate ways in order to build value for the client.
C4.3	Applying knowledge, tools and technical expertise to create value for the client		Demonstrates how value was created for the client through use of knowledge, tools and expertise and shows how this was tailored to meet the client's needs.
<b>C5</b>	<b>Tools and methodologies</b>		<i>Selects and uses appropriate diagnostic tools, techniques and methodologies</i>
C5.1	Selects and uses appropriate diagnostic tools, methods and techniques	D5.1.1	Evaluates tools and techniques against validity criteria and uses them to obtain best data, information or knowledge available, within budgetary or organisational constraints.
		D5.1.2	Uses a variety of data gathering, problem solving and analytical techniques that take into account client and own values and objectives and the type of recommendations to be made.
<b>C6</b>	<b>Risk and Quality Management</b>		<i>Defines risk criteria, identifying, mitigating and managing risks and outcomes</i> <i>Defines quality standards, ensuring quality of delivery and client satisfaction</i>
C6.1	Managing risk and issues	C6.1.1	Analyses risk in an engagement including, where appropriate, risk identification and evaluation (probability and impact assessment) and identifies suitable responses to risk (prevent, reduce, transfer, accept, contingency).
		C6.1.2	Where appropriate, applies risk management processes including planning and resourcing, monitoring and reporting. Where appropriate, uses risk and/or issue logs, reports, risk mitigation and/or recovery action and the use and control of contingencies. Demonstrates suitable responses to issues that arise during an assignment.
C6.2	Managing quality	C6.2.1	Identifies success criteria to ensure required quality of deliverables is achieved.
		C6.2.2	Assures quality compliance of own deliverables and, where appropriate, those of the consultancy team.
		C6.2.3	Monitors and measures client satisfaction.

Competence Framework Reference			
<b>D Professional Competence</b>		Sub-competence	<i>Operates with professionalism and integrity in all aspects of role including conduct, adhering to codes of practice and working in the best interests of the client.</i>
<b>D1</b>	<b>Ethics &amp; Integrity</b>		<i>Demonstrates appropriate ethical behaviour and adheres to the CMC Global Code of Professional Conduct and Ethics.</i>
D1.1	Demonstrates ethical behaviour		Applies professional and ethical criteria and withdraws from an engagement that discovers, or causes, illegal activity.
<b>D2</b>	<b>Behaviour &amp; Values</b>		<i>Demonstrates professional behaviour, values, standards and respect for the profession.</i>
D2.1	Appropriate Advice & Recommendations		Ensures professional advice is sound and relevant to client's needs.
D2.2	High Standards		Sets high personal standards, acts with integrity, respects confidentiality, and is courteous, reliable and responsive in dealing with others.
D2.3	Managing Diversity		Understands and manages diversity in terms of culture, religion, race and gender.
D2.4	Professional Behaviour		Demonstrates behaviour that earns the respect of professional colleagues.
D2.5	Respect		Demonstrates respect for the profession and colleagues
<b>D3</b>	<b>Personal</b>		<i>Takes and maintains responsibility for actions and impact of selected course of action on others. Handles complexity in the operating environment.</i>
D3.1	Taking responsibility for own actions		Maintains responsibility to the client to remain within the scope of work. Identifies, and where appropriate notifies colleagues of, issues outside scope of work.
D3.2	Handles complexity		Works effectively in complex environments containing value-conflicts and uncertainties, needing, at most, only indirect supervision.
<b>D4</b>	<b>Inter-Personal</b>		<i>Interacts effectively with others to achieve desired outcomes. Demonstrates influencing skills. Demonstrates communication skills.</i>
D4.1	Interacts effectively with others		Shares views with others, expressing own ideas and thoughts clearly and openly while also being prepared to listen to other, differing, views before reaching conclusions. Where appropriate, uses professional network to seek contributions from others.
D4.2	Demonstrates influencing skills		Presents ideas convincingly to the client to achieve specific outcomes.
D4.3	Demonstrates communication skills		Conveys information in a clear focused style using effective verbal, non-verbal, graphical, written and

Competence Framework Reference			
<b>D Professional Competence</b>		Sub-competence	<i>Operates with professionalism and integrity in all aspects of role including conduct, adhering to codes of practice and working in the best interests of the client.</i>
			oral communication techniques in formal and informal situations.
<b>D5</b>	<b>Continued Learning and Development</b>		<i>Plans self-development and shows track record of personal growth</i>
D5.1	Sets personal objectives		Identifies opportunities and sets personal objectives for a tailored Continuing Professional Development Program.
D5.2	Proactively seeks development opportunities		Pro-actively seeks opportunities to promote self-development. Seeks and acts on feedback from clients, superiors, peers and team members to further personal development. Learns from own and others past assignments.
D5.3	Demonstrates active learning		Demonstrates a logical process to seek out new tools and techniques and identify their relevance to current and future work.

## APPENDIX V: FREQUENTLY ASKED QUESTIONS

**Q:** Can you describe what the CMC-Global Institute is all about?

**A:** The purpose of CMC-GI is to create a forum for management consultants in countries where there is no established Institute of Management Consulting. This means that consultants anywhere in the world can become members and can pursue their CMC designation.

When there is sufficient critical mass in any one country, members can form their own national IMC.

**Q:** What does the CMC-GI offer?

**A:** CMC-GI offers:

- Professional association with other professional management consultants.
- Access to professional development activities.
- Access to publications of interest to management consultants.
- Access to virtual resources and training.
- Ability to apply for and earn the CMC designation.

**Q:** How can I find other CMC-Global Institute members near me?

**A:** Please visit our website Visit our website at: [www.cmcgi.org](http://www.cmcgi.org) or contact [membership@cmcgi.org](mailto:membership@cmcgi.org).

**Q:** What is the value in becoming a CMC?

**A:** The Certified Management Consultant (CMC) designation is the profession's only international certification mark, recognized in more than 50 countries. It represents a commitment to the highest standards of consulting and adherence to the ethical standards of the profession.

The qualification rigorously assesses candidates to meet standards, including:

- **Knowledge:** of business, organization, functional specialization, market sector, and national economy and culture.
- **Skills:** interpersonal, process, and analytical
- **Competence:** demonstration in client assignments of competence in operating a complete consulting process and appropriate behavior.
- **Trustworthiness:** adherence to a defined code of conduct and professional ethics and an understanding of the implications of doing so.

**Q:** Where can I learn more about becoming a Certified Management Consultant (CMC)?

**A:** A copy of the CMC competency profile can be found at <https://www.cmc-global.org/content/cmc-global-institute-cmc-gi> here: <http://bit.ly/1Nmg1K2>.



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**Q:** I had a CMC qualification in my country and I am about to relocate to another country. Do I have to apply again?

**A:** No, the CMC certificate can be transferred to any country with an IMC. All Members of CMC-Global have signed a reciprocity agreement to recognize the CMC qualification. If there is no IMC in the country to which you are moving, you can transfer your membership to CMC-GI.

**Q:** What do I have to do to transfer my membership?

**A:** Simply contact [membership@cmcgi.org](mailto:membership@cmcgi.org) . You will be asked to complete our membership application form to ensure that we have all of your basic data in place. We will also contact your current IMC to receive a letter from them that you are a member in good standing. Your transfer will adhere to the reciprocity rules within CMC-Global.

## CMC-GI Organization and Contacts

CMC-Global Institute:

Website: [www.cmcgi.org](http://www.cmcgi.org)

Email: [membership@cmcgi.org](mailto:membership@cmcgi.org)

### Interested in being in involved in the global CMC community?

- Visit our website at: [www.cmcgi.org](http://www.cmcgi.org)
- Subscribe to CMC-Today, the newsletter for the world's management consultants. You can also read back-issues. <http://www.cmc-global.org/content/newsletter-archive>
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