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INSTITUTE OF MANAGEMENT CONSULTANTS

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The Institute

Background

The Institute is the professional body representing management consultants. It sets and maintains standards for the profession in South Africa. It seeks to make the profession of management consulting recognised, respected and accepted as providing a valuable and indispensable service to organisations in South Africa and the Southern African Region.

The IMCSA thus:

- + Draws from and services all facets of our society.
- + Encourages the achievement of standards required by the profession through its accreditation process.
- + Promotes and maintains contact with complementary local, regional, national and international bodies.

Mission

The Institute was inaugurated on 28 April 1972 to: *Act as the certifying body for the Management Consulting Profession and to represent and enhance the Profession of Management Consulting in South Africa to clients, authorities and the community at large.*

Institute activities

To achieve its mission, the Institute undertakes the following activities:

- + The maintenance of the code of professional conduct and the required disciplinary procedures.
- + Settings of standards for acceptance to the Institute in order to promote public confidence in its members, qualifications and abilities.
- + The certification of successful applicants.
- + The provision of education programmes for members and potential members.
- + The maintenance of a member's handbook and register of skills.
- + Promotional and public relations activities.
- + The distribution of a journal, brochures, articles and informative material.
- + The arrangement of social functions, including the achiever of the year award.

Definitions

Management Consulting is the provision of independent advice and assistance about the process of management to clients with management responsibilities.

A **Management Consultant** is an individual who provides independent advice and assistance about the process of management to clients with management responsibilities.

A **Professional Management Consultant** is a management consultant who views management consulting as a profession, who strives for self-improvement in the processes of both management and management consulting, and who subscribes to the code of ethics of a professional body of management consulting.

A **Certified Management Consultant** is a professional management consultant who meets relevant requirements of character, qualifications, experience, competence and independence established by the professional body issuing certification.

Values and assets

The Institute will maintain certain values, which are regarded as important to the Mission. The individual members will always be the backbone of the Institute. The larger consulting firms will continue to play a major role in the development of the profession. The Institute shall always protect its professional and ethical image, which it regards as essential to obtain a client's trust.

The Institute has certain strengths, which are used to promote the concepts of consulting and to represent the profession. The "tangible" assets are the standards and processes, which clearly indicate its belief in the professionalism and ethics of consultants.

The "intangible" assets incorporate a history of over 20 years during which the Institute have been well accepted by consultants, including most of the major firms, and by public institutions. The major firms have always supported the National Council; in so doing they have helped overcome a key weakness of the Institute: the lack of available time of individual consultants to work on Institute projects without reward.

There is much support for the concept of consulting as a remedy for the skills shortage in the Southern African region. The IMC is committed to expanding its role as agent of change in the society. The IMC believes that individual Members and the consulting firms that are registered with the Institute can play their part in working towards these objectives.

The consulting firm is a key resource in a developing nation. The new political society with its need for changing attitudes and new industrial-, information- and service-based society will require management skills. Consultants in management, productivity, education and technology can be a factor in creating prosperity for the rapidly growing population and, hence, bring stability in society.

During this period of change, the Institute is striving to attract membership applications from all sectors of the population, without sacrificing the demanding standards, which ensure international accreditation. The consulting profession is experiencing a period of strong growth and there has been an increase in applications from smaller, specialised firms as the demand for these services increases. As markets become increasingly global, it is necessary to ensure that all IMC members comply with "world class" requirements and are equipped to compete in global markets.

Benefits of membership

The full benefit of membership can best be achieved through active participation in Chapter and National Activities. Some of the many benefits of membership and participation to consider are:

Recognition - Members are graded according to skills and experience and are required to abide by a Code of Professional Conduct. Private and public sectors clients recognise members as respectable reliable sources of advice.

Networking - Activities of the Institute facilitate networking with fellow professionals. Members may meet to exchange ideas and look towards cooperative opportunities.

Chapter activities - Being an active part of Chapter activities provides many benefits including social days, practice development, special speakers, and locally produced seminars.

Member register - A members' register is produced annually. The register will be available to confirm that a member is indeed registered with the institute.

Management Today - The magazine is a local publication focused on the professional and the buying public for their services. Members receive this magazine as part of their membership subscription, ten times yearly. New trends in management consulting are just some of the issues discussed within the journal.

Newsletters - Newsletters are produced quarterly throughout the year and are published in the magazine. These discuss relevant management consulting issues and information, and are a regular update forum for Institute members.

Other communications – The IMCSA generates other communications throughout the year which are distributed via the most appropriate medium, be it email or post.

Professional Development - Members can attend accredited professional development programmes.

Industry mouthpiece – the IMCSA speaks on behalf of the profession on subjects such as standards, education, ethics and other topical matters.

International reciprocity – certified management consultants enjoy reciprocity with some thirty-member nations as described under “international links”.

International links

This Institute of Management Consultants is a founding member of the International Council of Management Consulting Institutes (ICMCI) and is a contributing member.

Certified membership of the South African Institute allows reciprocity by benefits with each member country without the need for further assessments or examination, offering distinct benefits to those members who travel in their job. This is particularly relevant for those who wish to practice in countries where the management consulting industry is regulated, such as North America, Asia Pacific and parts of Europe.

The IMCSA maintains these links, attends annual congresses and participates actively on special task groups.

Becoming a member

General Conditions

Membership of the Institute is available to:

- ✚ Management consultants whose principal activity is the practice of management consulting, whether they are self employed or employees of a firm in public practice.
- ✚ Internal Consultants whose employers are not engaged in the public practice of management consulting for a fee.
- ✚ Academics who consult to management.
- ✚ Members also satisfy the standards required by the Institute in respect of qualifications, experience and personal qualities. Members are entitled to use the post-nominals designated for the particular grade membership.

All grades of membership need to sign and abide by the Institute's code of professional conduct.

Grades of membership

Associate (AIMC)

This category is reserved for **individuals who wish to be involved in the profession** without necessarily complying with the entry criteria.

Member (MIMC)

A graduate with **less than three years management consulting experience** or a non-graduate with less than eight years management consulting experience may qualify as a Member. Members of the academic professions and those people who provide internal consulting are to be classified as members until such time as they can demonstrate they have the relevant management consulting experience, at which time they may be classified as a Certified Member.

Certified Management Consultant (CMC)

Certified Management Consultant is the mark of competency for the management consulting industry and is recognised internationally. The CMC designation is consistent with internationally accepted standards and indicates that a management consultant meets certain requirements of character, education, and experience.

Existing members with a minimum of three years consulting experience are eligible to become a Certified Management Consultant (CMC) by examination or assessment. These examinations or assessments are offered to Members of the Institute and are held on request.

If an applicant does not possess a degree but has **five years of management experience plus 3 years of management consulting experience and is working full time as a management consultant**, he or she may be accepted as a Certified Management Consultant.

To retain CMC designation, members must perform 1200 hours of **management consulting** annually and 100 hours of **professional development** every three years. A CMC Practising Certificate is issued annually upon proof of fulfilment of the stated requirements.

The above requirements and standards are subject to variation by agreement between the member institutes of the ICMCI.

Fellow (FIMC)

A Certified Management Consultant, who has held that grade for not less than seven years and is deemed to have served the profession with distinction, may be graded as a Fellow. The applicant must submit a motivation with the request for an upgrade.

The final decision as to the satisfaction of these criteria resides with the presiding council.

The Code of Professional Conduct

It is the moral and ethical requirement of every CMC to adhere to the Professional code of conduct. This obligation is beyond the requirements of law. But like the law, adherence is enforced with disciplinary action, should it be required. The code of professional conduct defines an ethic for the profession of management consultants. This ethic must translate into the day-to-day realities between consultant and client.

All members agree in writing to abide by the Institute's Code of Ethics.

The International Code of Professional Conduct Guidelines:

- ✚ Confidentiality – to treat client information as confidential
- ✚ Unrealistic expectations – to refrain from encouraging unrealistic expectations or promising clients that benefits are certain from specific management consulting services
- ✚ Commissions/financial interest – to never accept commissions, remuneration or any other benefits from a third party in connection with recommendations to a client
- ✚ Assignments – to only accept assignments that the member has the skills and knowledge to perform and which will bring real benefit to the client.
- ✚ Conflicting assignments – to avoid acting simultaneously in conflicting situations without informing all parties in advance that this is intended
- ✚ Conferring with client – before accepting an engagement, to ensure that a mutual understanding of objectives, scope, work plan and fee arrangements has been established and all factors that may influence the conduct of the work are disclosed
- ✚ Recruiting – to refrain from inviting an employee of a client to consider alternative employment without prior discussion with the client
- ✚ Approach – to maintain a fully professional approach in all dealings with clients, the general public and fellow members
- ✚ Other management consultants – to ensure that other management consultants carrying out work on behalf of the member are conversant with and abide by the Code of conduct

The IMCSA's Professional Code of Ethics

- ✚ Maintain a professional approach, attitude and behaviour in all our dealings with clients, the general public and fellow members
- ✚ Accept assignments only for which we are qualified and where our objectivity, independence or integrity will not be impaired.
- ✚ Base our client recommendation on impartial observations, responsible opinion, pertinent facts and practical considerations.
- ✚ Ensure our anticipated benefits are obtainable and realistic.
- ✚ Disclose timeously to clients all financial or other interests in recommended goods or services.
- ✚ Ensure mutual understanding of all arrangements with clients prior to engagements.
- ✚ Maintain strict confidentiality of client information and never use privileged information without client permission.
- ✚ Refrain from inviting or receiving approaches from client's employees for employment, which could compromise client confidentiality and confidence.
- ✚ Accept an engagement only where there is no potential conflict of interest with one of our colleagues or where all parties are made aware in advance of the circumstances.
- ✚ Ensure all management consultants under our control are fully conversant with, and abide by the Code of Ethics.

Professionalism in Management Consulting

Professional management consultants are distinguished from other consultants by the emphasis placed on key areas of knowledge, competence and the focus on “professionalism”.

The “professional” standing requires that the consultant conforms to an established code of professional conduct and display competence in the areas described in the “Competency Framework” as functional/technical skills. More detail on the competency framework can be obtained from the Institute of Management Consultants of Southern Africa (IMCSA).

This focus on key areas of knowledge and competence requires continuing professional development in the areas of operation of the **Professional Management Consultant**.

There are various accreditation levels for consultants and any comprehensive development plan should give an indication of the expected levels of competency and proficiency in each of identified competencies, for each accredited level of consultant.

Personal Qualities of a Management Consultant

Certain personal qualities are required for effective consulting. These include:

- ✚ Dilemma analysis ability;
- ✚ Sense of organisational climate;
- ✚ Integrity;
- ✚ Sense of timing;
- ✚ Interpersonal skills.
- ✚ Intelligence
- ✚ Communication ability etc

In order to be recognised as a consultant of good standing, one needs to display and prove certain education, experience and skills. These include the ability to interact with customers, to critically analyse the situation and information at hand, to understand the business environment, both specifically and generically, to structure and present the findings and recommendation with good timing and to maintain a high level of integrity throughout the process.

Acceptance into the profession

Acceptance into the management consulting profession needs to be based on:

- ✚ Interest and activity in the profession.
- ✚ Educational background and qualifications.
- ✚ Inherent ability and personal attributes/ qualities.
- ✚ Proven experience in the required application area, be it functional/technical expertise or industry expertise.
- ✚ Term of association with the management consulting profession.
- ✚ Continued association with and dedication to the management consulting profession.

Experience and ability need to be evaluated on a pre-determined scale and equated to various levels of membership as well as seniority in a particular consulting organisation.

Certification of Management Consultants



CERTIFIED
MANAGEMENT CONSULTANT

Assessment of competence

Applicants for the Certified Management Consultant (CMC) qualification must satisfy the IMC of their competence, knowledge, awareness and understanding within four quadrants:

- + Consultancy Competence
- + Management Competence
- + Professional Specialisation - prior qualifications and/or prior experiential learning
- + Socio/technological/economic/political awareness

The CMC assessment process requires the applicant to collect evidence of competence, experience, education and training. It is therefore necessary to have relevant experience as a management consultant before applying to become a CMC.

Competence-based assessment is a method of establishing competence in the performance of a task or a range of tasks. Competent performance of tasks is measured against very specific criteria.

The CMC is a competence-based qualification.

The responsibility rests with the candidate, to produce *sufficient, relevant and timely* evidence of competence as a management consultant.

Evidence is provided in a variety of ways by:

- + Completing an application form
- + Producing a detailed Assignment Study
- + Making a presentation on the subject of the Assignment Study
- + Completing a Professional Record including a C.V.
- + Cross referencing the material in the Assignment Study and Professional Record against the CMC Statements of Competence
- + Providing corroboration of the evidence provided in the Assignment Study and Professional Record at an Assessment Interview
- + Giving details of three independent referees who can vouch for your competence as a management consultant

Annual Re-certification

Annual re-certification is currently not a requirement but is planned for the future and will require the submission of proof of assignments currently under way or completed since the last certification.

Annual re-certification will also require proof of continuing professional development.

Benefits of Certification for the Consulting Profession

By setting high entry standards and continuing demands for certification, the IMC protects and enhances the reputation of the profession as a whole. By requiring continuing professional development of its certified members, the IMC ensures that certified members are in a position to deliver the highest standard of service. The demand for certification status is above all other offerings of the IMC and members continuously rate certification as the single most important activity of an IMC. The standards for certification applied by the IMC in South Africa comply with the international standards required by the International Council of Management Consulting Institutes (ICMCI).

An additional benefit of international certification is automatic reciprocity and recognition between all member institutes of the ICMCI.

Benefits of Consultant Certification for Clients

Clients will be able to determine whether the consultant they are dealing with is certified, by contacting the IMC. National and international bodies, including governments, will be able to draw on the register of certified consultants. Clients will obviously not be obliged to use CMC's but will be encouraged to do so.

International Trends

Internationally, the standards of certification are being tightened and it is increasingly the trend to combine assessment and examination to ensure compliance. As a result, the process of certification is becoming more demanding and only internationally accredited certifiers will be allowed to certify management consultants in member countries.

Selecting Management Consultants

Many clients are not clear as to how to go about selecting a management consultant. The answer lies largely in the professional certification of management consultants.

A client can reasonably expect a management consultant to have experience in developing solutions to specific problems and the competence facilitate beneficial change. They expect integrity, responsibility and objectivity. In other words: professionalism.

If a client is not aware of what professionalism in consulting precisely means, this will most certainly affect their selection of a management consultant. The selection process becomes more informal and ad-hoc than it should be. This translates into less exact, less demanding standards, resulting in less certainty of satisfaction with the services rendered.

In summary, the IMC has established professional standards of competence, and ethics for the practice of management consulting. These standards are applied in the Institute's certification program for management consultants. Any individual who meets the Institute's membership requirements, and pledges to follow its Code of Professional Conduct, earns the Institute's professional designation of CMC. Thus, Institute certification provides a publicly recognised means of identifying qualified practitioners.

Consultants, who wish to ascertain whether they are eligible for certification, may contact the IMC for further information.

Clients, who wish to make use of this specific benefit, may contact the institute for details regarding certified consultants practicing in a particular field of expertise. This information will soon be available on a publicly accessible web site.

What is a CMC?

When you see the initials CMC following a consultant's name, it means that he or she is a **Certified Management Consultant** and has met strict certification requirements of the Institute of Management Consultants in his or her country.

If that Institute is a member of the International Council of Management Consulting Institutes, the initials mean the consultant has met world-class standards of competence, ethics and independence, and is eligible for reciprocity between ICMCI member institutes.

Requirements for Certification

These standards include:

Experience At least three years in management consulting

Education Recognised degree or professional qualification or additional five years in management consulting in lieu of a degree

Time spent 1200 hours per annum in active management consulting during the three qualifying years over the preceding five years and currently active in management consulting

Independence Owner or employee of a firm in independent practice or internal consultant in organisation meeting institute's independence criteria

Qualification Process

Examination Written examination or structured assessment /interview to test knowledge of the code of professional conduct and common body of knowledge

Sponsors Two sponsors who are full Members or Fellows (CMC, FCMC, MIMC, FIMC or equivalent)

References Written descriptions of five assignments or five client references verified through interview

Code of Conduct

CMCs must pledge in writing to abide by their Institute's Code of Professional Conduct.

Their adherence to this Code signifies voluntary assumption of self-discipline above and beyond the requirements of law. Every institute member of ICMCI has such a Code, which meets the minimum standards of ICMCI.

Institutes enforce their Code by receiving and investigating complaints of violations and by taking disciplinary action, including revocation of certification, against any member who is found guilty of Code violation.

The Mark of Excellence

The initials *FCMC* designate a Certified Management Consultant who is also a Fellow of his or her institute.

In some countries the ICMCI member institute may use the designations *MIMC* and *FIMC* to signify (certified) Member or Fellow of that Institute of Management Consultants. These consultants are internationally qualified as *CMC* and *FCMC*.

In selecting management consultants, managers are well advised to seek individuals who meet the profession's own standards of competence, ethics and independence.

Institute certification is a valuable aid in this quest. It is the mark of excellence among management consultants.

The value of independence in consulting

Introduction

All too often one hears the question; where do I get the right advice? The answer is never simple, especially in today's fast changing world where there is a new flavour, buzzword or problem every day.

The need for expert opinion

It is clear that an expert opinion is required in most technology conundrums, but where is the sage to be found? Technology is becoming more and more products specific and the advice one is likely to get is more probably going to come from the product expert selling a particular product in the first place.

A simple rule is: don't simply follow your neighbour because he (or she) is advertising the acquisition of the latest bit of technology that is founded in an unsound business case.

It was probably implemented because some senior AME (Airline Magazine Expert) read about it on the latest trip abroad and decided this was the way to go.

So where is this discussion leading to you may ask? The issue is how to make safe and unbiased technology decisions, given the number of advisers one has to choose from.

Conflicts of interest

There is a strong case to be made for the use of an independent consultant (or consulting firm) who has signed and abides by a code of ethical conduct. Such a code of conduct

prevents or discourages conflicts of interest between activities or services provided from the same source.

Conflicts may arise when a vendor also advises the client as to the best technology option. They may also arise when a multi-disciplinary firm audits, consults and potentially sells products to the same customer. Such practices are now being vigorously discouraged in European and American countries, resulting in the disposal of portions of such firms and the re-aligning of core business.

The value of traditional consulting principles

Many clients tend to disregard the value of segregating the production of a statement of requirements from the provision of the actual solution. Segregation of responsibilities and decision-making in complex processes is a basic management principle that is often ignored at the peril of the client organisation.

Who is best positioned to adjudicate the responses and even the performance of the solution providers?

The answer lies in analysing a number of related issues:

- ✚ The expertise within the client organisation
- ✚ The complexity of the assignment
- ✚ The need for project or programme management
- ✚ The number of options available to the client
- ✚ The desirability or necessity of performance level monitoring
- ✚ The availability of an independent third party with the required skills
- ✚ The cost factors
- ✚ Who is finally accountable for the success of the intervention or exercise?

Effective decision making and performance measurement

It is the writer's contention that should an evaluation of options and or performance measurement be required, an independent expert party is best positioned to perform this task.

The traditional view of a consulting engagement requires that a project (or programme) be structured in such a way that sound evaluation of options and independent measurement of progress can take place at key points (milestones) in the process.

By ignoring these basic principles, the client exposes himself to the risk that the consultant, service provider and performance measurer could be one and the same. How then are disputes resolved and who supplies the metrics?

Outsourcing

Outsourcing of non-core (or core) functions has had a chequered history for exactly these reasons.

The crux of the matter has been:

- ✚ Who determines the options available?
- ✚ Who recommends the best option?
- ✚ Which parties are involved in the legal documentation and signing?

- ✚ Who highlights the risks and the exit clauses?

In many cases, the parties involved in each step of the process have been the same throughout and objectivity may become an issue at some stage in what could be a lengthy and complex process.

The independent consultant

It should give the astute client some semblance of comfort that there are still independent and ethically bound specialists who are in a position to provide product independent services in areas such as:

- ✚ The definition of requirements and selection criteria
- ✚ The short-listing of service providers
- ✚ The assistance with the final decision process
- ✚ The provision of programme or vendor management services on behalf of the client.
- ✚ The monitoring of service level agreements.

Conclusion

Whilst it is true that there is no longer a multitude of professional consultants and service providers who can truly call themselves product or solution independent, the Institute of Management Consultants of South Africa (IMCSA) maintains a list of certified practitioners (CMC's) who provide independent services. These services are in the areas listed above and in addition cover mediation, arbitration or simply facilitation in complex situations, where clients and service providers require a fresh perspective or have reached an impasse.

Independent service providers not yet registered with the IMCSA may contact the secretariat at the numbers listed in this document.

Clients wishing to know more about the services provided by the IMCSA can contact the president or the secretariat at the same numbers. All enquiries will be treated confidentially.