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**CMI Level 7 Qualifications in Professional  
Consulting (QCF) Syllabus**  
January 2015 – Version 3

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## Qualification objective

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The CMI Level 7 Qualifications in Professional Consulting (QCF) have been developed by Chartered Management Institute (CMI) in cooperation with the Institute of Consulting (IC).

These qualifications are designed for Professional Consultants who want to develop their strategic skills within consulting such as organisational structure and culture, entry and diagnosis, communicating strategies for consulting and group dynamics and facilitating skills.

## Titles and reference numbers

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The titles given below are the titles as they will appear on the qualification when awarded to the learner. The qualification reference number is the number allocated to the qualification by the Regulator at the time of accreditation, which confirms that this is a fundable qualification on the QCF and is on the Register. The CMI code is the code which should be used when registering Learners with CMI. Each unit also has a unique QCF unit number – this appears with the content of each unit at the end of this document.

In accordance with Ofqual Condition E2, an awarding organisation must ensure that each qualification which it makes available, or proposes to make available, has a title which it uses consistently in its advertising and in its communications with users of qualifications. This includes:

- The name of the awarding organisation
- The level of the qualification
- The type of qualification (where the qualification has a type)
- A concise indication of the content of the qualification
- Any Endorsement known at the time the qualification is submitted to the Register

Therefore all CMI Approved Centres must use the full qualification title as per below when advertising or making reference to the qualifications.

<b>CMI Code</b>	<b>Title</b>	<b>Qualification reference number</b>
7A26	CMI Level 7 Award in Professional Consulting (QCF)	600/4452/4
7C26	CMI Level 7 Certificate in Professional Consulting (QCF)	600/4611/9
7D26	CMI Level 7 Diploma in Professional Consulting (QCF)	600/4453/6

## Accreditation dates

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These qualifications are accredited from 1<sup>st</sup> September 2012, which is the operational start date in CMI Approved Centres. The accreditation ends on 31<sup>st</sup> August 2017.

## Progression

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The IC and CMI recommendation for progression once completing the Professional Consulting qualifications would be to progress onto CMI Level 8 Award/Certificate/Diploma in Strategic Management and Leadership (QCF) qualifications.

## Entry and recruitment requirements

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These qualifications can be offered to learners from age 19. CMI does not specify entry requirements for these qualifications, but Centres are required to ensure that learners admitted to the programme have sufficient capability at the right level to undertake the learning and assessment.

CMI Approved Centre must ensure Learners are recruited with integrity onto appropriate qualifications that will:

- meet their needs
- enable and facilitate learning and achievement
- enable progression

In order to achieve this, the CMI Approved Centre will need to:

- Provide relevant programme information, guidance and advice, to enable informed Learner choice
- Publish entry and selection criteria
- Demonstrate that Learners are recruited with integrity
- Carry out comprehensive Learner induction that:
  - addresses programme and organisational requirements
  - explains Learner facilities
  - identifies Learners' development needs
  - develops an Individual Learning Plan

The qualification is offered in the medium of the English Language.

## Credit values

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**Credit value** is defined as being *the number of credits that may be awarded to a learner for the successful achievement of the learning outcomes of a unit.*

The credit value of the unit will remain constant in all contexts, regardless of the assessment method used or the qualification(s) to which it contributes. Learners will only be awarded credits for the successful completion of whole units. (One credit is awarded for those learning outcomes achievable in 10 hours of learning time).

**Learning time** is defined as *the amount of time a learner at the level of the unit if expected to take, on average, to complete the learning outcomes of the unit to the standard determined by the assessment criteria.*

**Guided Learning Hours** is defined as *the number of hours of teacher-supervised or directed study time required to teach a qualification or unit of a qualification.*

## Rules of combination

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**Rules of combination** are defined as being *a description of the credit accumulation requirements for the achievement of a named qualification.* The rules of combination must be adhered to in order to achieve the qualification.

### **CMI Level 7 Award in Professional Consulting (QCF)**

Learners must complete one unit to a minimum of 6 credits to achieve this qualification.

**Mandatory**

Unit Number	Unit Name	Level	Credits
7026	Organisational structure and culture	7	8
7027	Entry and diagnosis	7	9
7028	Group dynamics and facilitating skills	7	7
7029	Communication strategies for consulting	7	7
7030	Managing consultancy interventions	7	6
7031	Tools and techniques for effective consulting	7	9
7032	Managing the business of consulting	7	7

**CMI Level 7 Certificate in Professional Consulting (QCF)**

Learners must complete two units to a minimum of 13 credits to achieve this qualification.

**Mandatory**

Unit Number	Unit Name	Level	Credits
7026	Organisational structure and culture	7	8
7027	Entry and diagnosis	7	9
7028	Group dynamics and facilitating skills	7	7
7029	Communication strategies for consulting	7	7
7030	Managing consultancy interventions	7	6
7031	Tools and techniques for effective consulting	7	9
7032	Managing the business of consulting	7	7

**CMI Level 7 Diploma in Professional Consulting (QCF)**

Learners must complete all mandatory units to a total of 32 credits and three optional units to a minimum of 20 credits to achieve this qualification.

**Mandatory**

Unit Number	Unit Name	Level	Credits
7026	Organisational structure and culture	7	8
7027	Entry and diagnosis	7	9
7030	Managing consultancy interventions	7	6
7031	Tools and techniques for effective consulting	7	9

**Optional**

Unit Number	Unit Name	Level	Credits
7028	Group dynamics and facilitating skills	7	7
7024	Professional practice	7	6
7025	Professional development in consulting	7	7
7032	Managing the business of consulting	7	7
7029	Communication strategies for consulting	7	7
7002V1	Developing performance management strategies	7	7
7006V1	Reviewing organisational strategy plans and performance	7	9
7009V1	Strategic project management	7	6
7010V1	Implementing organisational change strategies	7	7
7020V1	Leadership coaching and mentoring skills	7	7

## Delivery of CMI qualifications

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For information and guidance on delivery of CMI qualifications, please see the CMI Level 7 Guidance document. [Please click here to view this document.](#)

## Assessment and verification

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For information on assessment and verification of CMI qualifications, please see the CMI Level 7 Guidance document. [Please click here to view this document.](#)

## External Assessment

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As part of our dedicated service, Chartered Management Institute (CMI) Awarding Body offers the opportunity for all centres to have their Learner's assignments Externally Assessed.

Some CMI Approved Centres choose to send one assignment of the qualification to be externally assessed, as it gives the learner a CMI quality stamp, as it marked and assessed by the Awarding Body.

This service provides Centres with a simplistic, professional and cost effective way to get their CMI Learner's work assessed and certificated within a six week period and all for the excellent price of just £30 per assignment (excluding VAT).

Further information on this service and the units for which it is available appears on the [CMI website](#).

## Recognition of Prior Learning and Achievement

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The Qualifications Credit Framework (QCF) is based on the principle of credit accumulation and transfer. Within this suite of qualifications, learners have the opportunity to build their achievements from a single unit into a full Diploma. CMI will publish on its website which units and qualifications from other Awarding Bodies can be recognised for credit transfer and exemption. Credit transfer in the QCF will be based on confirmation of achievement of QCF numbered units. [Click here](#) for the Progressions and Exemptions list.

There will of course still be instances where learners will wish to claim recognition of prior learning which has not been formally assessed and accredited. In those instances, Centres are free, after discussion and agreement with their Quality Manager, to allow these learners direct access to the relevant assessment for the unit, without unnecessary repetition of learning.

## Accessibility of CMI qualifications

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There may be incidents where Learners may require special consideration and reasonable adjustments to the delivery and assessment of qualifications. In the event of this, Centres should notify their allocated Quality Manager and CMI.

## Study resources

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Take advantage of the CMI's management knowledge through our Information Services. Our resources, which are unequalled in scope, variety and accessibility, are available to members and are designed to give you the support you need to succeed throughout your management career.

### Study Support

[www.managers.org.uk/study](http://www.managers.org.uk/study)

Study Support is organised by qualification and unit. It brings together a range of materials and resources to assist members in their research and studies. These resources include Management Checklists on key skills and techniques, suggested further reading and links to e-journals. Simply login to [ManagementDirect](#) and an option for Study Support will be presented on the home page. Tutors wishing to view resources should go to [ManagementDirect](#) and click on **More...** and then **Study Support**.

A series of **Study Guides** will help you to cope with the stresses and demands of study, while our expanding **Management Models** series provide a one-page overview of some of the more widely used techniques. View all our exciting resources by category in our updated **Management Direct**.

### Management Direct

[www.managers.org.uk/mgtdirect](http://www.managers.org.uk/mgtdirect)

*It's fast, accurate and free to members*

**Management Direct** is an effortless retrieval facility which delivers the full range of CMI resources on management skills and practice.

- Multimedia resources – 60 Leader Videos, CMI podcasts and e-learning modules
- Authoritative definitions of management terms
- 225 Management Checklists and 60 Management Thinker profiles
- Downloadable articles and research
- Lists of books and articles which are available from our management library

All these resources are freely available to members from one source where you can search by subject. Definitions give you a headline understanding of topic; Checklists and Models provide the essentials; and books and articles enable you to research further. Depending on your need you choose how far you want to go.

### For in depth research try our e-journals service

[www.managers.org.uk/ejournals](http://www.managers.org.uk/ejournals)

The Chartered Management Institute has joined forces with EBSCO Information Services to offer members access to Business Source; Corporate, a database providing direct access to articles on management and business from a range of academic journals and business magazines. Members also have access to country, company and industry reports from leading providers.

### CMI Library

[www.managers.org.uk/library](http://www.managers.org.uk/library)

The CMI Library database offers members access to CMI's database of books, reports and documents on management techniques and practice. The database provides abstracted references to help you identify appropriate resources.



You can search by a wide range of criteria; download content and export lists of resources. Members (within the UK) can submit requests to borrow books and pamphlets from the library.

### **E-books**

[www.managers.org.uk/ebooks](http://www.managers.org.uk/ebooks)

Our collection of e-books provides you with 24 hour access to a selection of general management and consulting textbooks. Search through each book for specific content or use the chapter index to browse. E-books are available when you need them – no more waiting for a book to be returned to the library.

### **Management Community**

[www.managers.org.uk/community](http://www.managers.org.uk/community)

Network with other students or managers through our new community. Go online and share ideas, discuss problems, find solutions and build your online profile.

### **Information Services**

#### **Ask a researcher**

Unable to find what you are looking for, or do you have a research need that we can help with? Our qualified, experienced and knowledgeable team of researchers can be contacted by e-mail or telephone. We will respond within one working day.

#### **Contact CMI's Information Services**

Enquiry line: **01536 207400** or email: [ask@managers.org.uk](mailto:ask@managers.org.uk)

The Information Centre is open to visitors

Monday - Friday 9am - 5pm



<b>Title:</b>	Professional practice				
<b>QCF Level:</b>	7	<b>QCF Number</b>	T/503/7176	<b>Unit Number</b>	7024
<b>Credit value:</b>	6	<b>Guided Learning Hours</b>	20		
<b>Learning outcomes</b> <i>The learner will:</i>			<b>Assessment criteria</b> <i>The learner can:</i>		
1. Be able to act with professionalism and integrity as a consultant			1.1 Explain why it is important to represent the profession of consultancy responsibly 1.2 Evaluate the significance of integrity in the consulting process 1.3 Evaluate the importance of codes of conduct and practice to clients, consulting organisations and the industry		
2. Understand the importance of maintaining confidentiality in professional practice			2.1 Assess methods of ensuring client confidentiality is maintained 2.2 Discuss the dilemmas that may arise relating to confidentiality of information and how these may be resolved		
3. Know how to behave in an ethical manner when working as a consultant			3.1 Identify a range of ethical dilemmas which a consultant may experience 3.2 Explain how to resolve a range of ethical conflicts 3.3 Critically evaluate the role of an organisation's cultural values in promoting a high standard of ethical conduct from its consultants		
<b>Additional Information about this unit</b>					
Unit aim(s)			This unit is about the professional and ethical standards to which a management consultant should work.		
Additional information			Required assessment methodology dependent upon the circumstances:- Written assignment Work based evidence, observation, witness testimony Professional discussion Questioning		
Link to CMI Resources			<a href="#">Click here</a> to access Unit 7024 Study Support. <i>Please note you will need to be logged in to view.</i>		
Recommended Reading			<i>Please see the booklist at the end of this document.</i>		

<b>Title:</b>	Professional development in consulting			
<b>QCF Level:</b>	7	<b>QCF Number</b>	A/503/7177	<b>Unit Number</b> 7025
<b>Credit value:</b>	7	<b>Guided Learning Hours</b>	35	
<b>Learning outcomes</b> <i>The learner will:</i>		<b>Assessment criteria</b> <i>The learner can:</i>		
1. Be able to manage personal professional development		1.1 Explain how emerging trends and challenges impact upon the strategic direction of the consultants own organisation 1.2 Evaluate the skills, knowledge and behaviours required by the consultant to meet these challenges 1.3 Appraise the costs and benefits of different personal professional development activities 1.4 Construct a personal development plan (PDP) to support personal professional development 1.5 Assess the impact of the personal development plan on the achievement of organisational objectives		
2. Be able to manage the personal development of others		2.1. Explain the link between human resource development and organisational effectiveness 2.2 Evaluate methods of assessing skills, behaviours and competencies of teams and individuals fairly and objectively 2.3 Construct personal development plans at both team and individual level 2.4 Critically evaluate different methods of providing feedback to individuals and teams 2.5 Discuss the effects of a culture of encouraging continual professional development (CPD) on the performance of an organisation/consultancy practice 2.6 Explain why an organisation/consultancy practice should appraise the impact to the organisation of individuals undertaking specific CPD		
3. Be able to manage personal networks		3.1 Critically evaluate the role of networks in personal development, client interface and career progression		

	<p>3.2 Assess the benefits to the consultant's organisation of developing personal networks</p> <p>3.3 Evaluate the effectiveness of existing networks in contributing to personal and organisational objectives</p> <p>3.4 Develop a plan to improve and expand current personal networks</p> <p>3.5 Discuss the skills and behaviours required to build and maintain networks</p>
<b>Additional Information about this unit</b>	
Unit aim(s)	This unit is about the importance of human resource development on a personal and organisational level.
Additional information	Required assessment methodology dependent upon the circumstances:- Assignment Professional discussion Questioning
Link to CMI Resources	<a href="#">Click here</a> to access Unit 7025 Study Support. <i>Please note you will need to be logged in to view.</i>
Recommended Reading	<i>Please see the booklist at the end of this document.</i>

<b>Title:</b>	Organisational structure and culture				
<b>QCF Level:</b>	7	<b>QCF Number</b>	F/503/7178	<b>Unit Number</b>	7026
<b>Credit value:</b>	8	<b>Guided Learning Hours</b>	35		
<b>Learning outcomes</b> <i>The learner will:</i>			<b>Assessment criteria</b> <i>The learner can:</i>		
1. Understand the effects of organisational structure			1.1 Explain different types of organisational structures 1.2 Analyse the impact of organisational structure on the achievement of its operational and strategic objectives 1.3 Describe situations where organisational structure can have a negative impact upon the organisation		
2. Understand the impact of organisational culture on an organisation			2.1 Discuss the different types of organisational cultures that may exist within client organisations 2.2 Evaluate the external and internal influences on organisational culture 2.3 Analyse the impact of organisational culture on the achievement of an organisation's objectives 2.4 Critically evaluate a range of tools and models that a consultant may use when analysing the current culture of an organisation 2.5 Describe the effects of a culture which does not support organisational objectives		
3. Understand the impact on a consultant's work of structure and culture within a client organisation			3.1 Assess the impact of different cultures and structures within client organisations on the consultancy intervention 3.2 Evaluate how legal, regulatory and organisational policies within a client organisation impact upon the work of a consultant 3.3 Explain how an organisation's values, culture and structure may affect the recommendations made by a management consultant 3.4 Discuss the role of the consultant in supporting changes to organisational culture		

	and structure
<b>Additional Information about this unit</b>	
Unit aim(s)	This Unit is about how an organisation's structure and culture affects that organisation and the work of the consultant
Additional information	Required assessment methodology dependent upon the circumstances:- Assignment Professional discussion Questioning
Link to CMI Resources	<a href="#">Click here</a> to access Unit 7026 Study Support. <i>Please note you will need to be logged in to view.</i>
Recommended Reading	<i>Please see the booklist at the end of this document.</i>

<b>Title:</b>	Entry and diagnosis				
<b>QCF Level:</b>	7	<b>QCF Number</b>	J/503/7179	<b>Unit Number</b>	7027
<b>Credit value:</b>	9	<b>Guided Learning Hours</b>	40		
<b>Learning outcomes</b> <i>The learner will:</i>			<b>Assessment criteria</b> <i>The learner can:</i>		
1. Know how to establish and maintain working relationships with the client			1.1. Assess the effect client competencies and behaviours have on the consultant/client relationship 1.2. Critically evaluate a range of tools and techniques that can be used to establish positive working relationships and credibility with clients 1.3. Assess the impact on consultancy interventions of consultant/client relationships 1.4 Evaluate the role of professionalism, ethics and confidentiality to the consultant/client relationship 1.5 Explain how to manage client expectations		
2. Be able to manage communications during entry and initial diagnosis			2.1 Assess the communication needs of key individuals in the consulting and client organisation 2.2 Analyse the information requirements and levels of information access for key individuals within the consulting and client organisation 2.3 Evaluate tools and methods of effective communication within clients, stakeholders and consulting organisations		
3. Be able to develop a strategy for identifying and scoping client needs			3.1 Explain the techniques a consultant may use to appreciate the client perspective and the needs of stakeholders 3.2 Critically evaluate sources of information and methods of researching client's issue 3.3 Assess the significance of risk appraisal and benefit analysis to the scoping process 3.4 Explain how to agree a problem statement/scoping document with the client 3.5 Assess the importance of identifying key constraints and/or criterion for success in scoping client needs		

4. Be able to develop the client proposal document	<p>4.1 Explain the process for qualifying the proposal with the consultants own organisation</p> <p>4.2 Discuss the typical contents of a proposal document</p> <p>4.3 Analyse the process of budgeting for human and other resources required in the project</p> <p>4.4 Assess the impact of client competencies on proposal development</p> <p>4.5 Evaluate the impact of organisational, legal or regulatory issues on producing client proposals</p>
<b>Additional Information about this unit</b>	
Unit aim(s)	This Unit is about the initial entry and diagnosis stage of the consultancy cycle. It explores how to develop and nurture a positive client relationship and how to identify client needs and produce a proposal document
Additional information	Required assessment methodology dependent upon the circumstances:- assignment Professional discussion Questioning
Link to CMI Resources	<a href="#">Click here</a> to access Unit 7027 Study Support. <i>Please note you will need to be logged in to view.</i>
Recommended Reading	<i>Please see the booklist at the end of this document.</i>



<b>Title:</b>	Group dynamics and facilitating skills				
<b>QCF Level:</b>	7	<b>QCF Number</b>	A/503/7180	<b>Unit Number</b>	7028
<b>Credit value:</b>	7	<b>Guided Learning Hours</b>	30		
<b>Learning outcomes</b> <i>The learner will:</i>			<b>Assessment criteria</b> <i>The learner can:</i>		
1. Understand group dynamics and the impact on the achievement of objectives			1.1. Evaluate a range of models on group dynamics and high performing teams 1.2. Assess the impact of group dynamics on the achievement objectives and consultancy intervention outcomes 1.3 Create a strategy to develop the skills required for a high impact team 1.4 Devise strategies to overcome the negative effects of group dynamics on consultancy interventions		
2. Be able to strategically lead groups			2.1 Evaluate the role of the consultant as a leader in ensuring a consultancy/project team achieves its objectives 2.2 Evaluate the techniques a consultant may use to direct groups and teams 2.3 Discuss the different roles a consultant may be required to adopt to ensure the effectiveness of the group 2.4 Explain situations when it may be appropriate for a consultant to adopt the role of facilitator 2.5 Evaluate the challenges in managing a diverse group		
3. Be able to develop productive working relationships with others			3.1 Assess the impact of a consultant's behaviour on developing and maintaining productive working relationships 3.2 Evaluate strategies and techniques for developing good working relationships with managers, team members and peers		
<b>Additional Information about this unit</b>					
Unit aim(s)			This Unit is about the impact of group dynamics and how to strategically lead groups in a consulting context. Strategies for developing and maintaining productive working relationships within the consultant organisation		

	are also covered in this unit
Additional information	Required assessment methodology dependent upon the circumstances:- Written assignment Work based evidence, observation, witness testimony Professional discussion Questioning
Link to CMI Resources	<a href="#">Click here</a> to access Unit 7028 Study Support. <i>Please note you will need to be logged in to view.</i>
Recommended Reading	<i>Please see the booklist at the end of this document.</i>

<b>Title:</b>	Communication strategies for consulting				
<b>QCF Level:</b>	7	<b>QCF Number</b>	F/503/7181	<b>Unit Number</b>	7029
<b>Credit value:</b>	7	<b>Guided Learning Hours</b>	35		
<b>Learning outcomes</b> <i>The learner will:</i>			<b>Assessment criteria</b> <i>The learner can:</i>		
1. Understand how communication impacts on others involved in the consulting process			1.1 Explain theories and concepts relating to verbal and non verbal communication methods 1.2 Evaluate the impact of verbal and non verbal communication skills on the achievement of objectives 1.3 Evaluate the impact of verbal and non verbal communication skills on the development of productive working relationships 1.4 Discuss how verbal and non verbal communication skills can be used to overcome difficult situations		
2. Be able to create a communication strategy for a consultancy intervention			2.1 Discuss methods and techniques for identifying key individuals to be included in any communication strategy 2.2 Analyse the needs of key individuals in any communication strategy 2.3 Analyse the information requirements and levels of information access required for the consultancy intervention 2.4 Discuss the key factors that influence the choice of communication methods to be used		
3. Understand how to communicate the results of consultancy interventions			3.1 Discuss concepts and theories relating to the management of meetings 3.2 Explain the nature of report writing for impact 3.3 Discuss concepts and theories relating to delivering presentations for impact 3.4 Evaluate different methods of presenting results of consultancy interventions to clients 3.5 Discuss the process of designing and delivering a training programme		
<b>Additional Information about this unit</b>					
Unit aim(s)			This Unit considers the importance of a		

	communication strategy to the success of an intervention and how to communicate the results of interventions effectively.
Additional information	Proposed Assessment methodology dependent upon the circumstances:- Assignment Presentation Professional discussion Questioning
Link to CMI Resources	<a href="#">Click here</a> to access Unit 7029 Study Support. <i>Please note you will need to be logged in to view.</i>
Recommended Reading	<i>Please see the booklist at the end of this document.</i>

<b>Title:</b>	Managing consultancy interventions				
<b>QCF Level:</b>	7	<b>QCF Number</b>	J/503/7182	<b>Unit Number</b>	7030
<b>Credit value:</b>	6	<b>Guided Learning Hours</b>	25		
<b>Learning outcomes</b> <i>The learner will:</i>			<b>Assessment criteria</b> <i>The learner can:</i>		
1. Understand the consulting model			1.1. Analyse the key activities involved at each stage of the consulting cycle 1.2 Evaluate the risks and challenges which may occur at each stage of the consulting cycle 1.3 Develop strategies to overcome risks and challenges which may occur during an intervention		
2. Understand how to use different approaches to a consultancy intervention			2.1 Discuss a range of interventions a consultant may be involved in 2.2 Evaluate a range of approaches and styles that can be used by consultants in different interventions 2.3 Select suitable approaches to meet the nature and type of consultancy intervention		
<b>Additional Information about this unit</b>					
Unit aim(s)			This Unit is about understanding the consultancy cycle and associated risks. It also covers the differences in approach and style which may be used in different situations.		
Additional information			Proposed Assessment methodology dependent upon the circumstances:- Assignment Professional discussion Questioning		
Link to CMI Resources			<a href="#">Click here</a> to access Unit 7030 Study Support. <i>Please note you will need to be logged in to view.</i>		
Recommended Reading			<i>Please see the booklist at the end of this document.</i>		

<b>Title:</b>	Tools and techniques for effective consulting				
<b>QCF Level:</b>	7	<b>QCF Number</b>	L/503/7183	<b>Unit Number</b>	7031
<b>Credit value:</b>	9	<b>Guided Learning Hours</b>	35		
<b>Learning outcomes</b> <i>The learner will:</i>			<b>Assessment criteria</b> <i>The learner can:</i>		
1. Understand how to identify client needs			1.1. Explain the need to apply a structured approach in identifying the client issues 1.2. Evaluate a range of tools and techniques a consultant may use in defining the client needs		
2. Be able to develop appropriate research strategies for consultancy interventions			2.1 Evaluate a range of methods of gathering and sourcing key information and knowledge for use in consultancy interventions 2.2 Explain how to validate and filter the knowledge and data gathered 2.3 Evaluate different tools and techniques of data analysis that a consultant may use 2.4 Assess how a range of problem solving and decision making tools and techniques may be used in consultancy interventions 2.5 Discuss the role of creative thinking in the analysis of data and knowledge		
3. Understand the importance of expert tools and techniques to a management consultant			3.1 Evaluate the contribution that performance management, benchmarking, modelling and business process improvement techniques make to a consultancy intervention 3.2 Evaluate the benefits and limitations of a range of tools and techniques which could be used in a consultancy intervention 3.3 Select the most appropriate analysis techniques and tools for an intervention 3.4 Evaluate ways of leveraging operating experience and knowledge for the future benefit of the practice		
<b>Additional Information about this unit</b>					
Unit aim(s)			This Unit aims to develop awareness and application of core generic tools and techniques which will be relevant to consultancy interventions.		
Additional information			Proposed Assessment methodology dependent upon the circumstances:-		

	Assignment Professional discussion Questioning
Link to CMI Resources	<a href="#">Click here</a> to access Unit 7031 Study Support. <i>Please note you will need to be logged in to view.</i>
Recommended Reading	<i>Please see the booklist at the end of this document.</i>



<b>Title:</b>	Managing the business of consulting				
<b>QCF Level:</b>	7	<b>QCF Number</b>	R/503/84	<b>Unit Number</b>	7032
<b>Credit value:</b>	7	<b>Guided Learning Hours</b>	35		
<b>Learning outcomes</b> <i>The learner will:</i>			<b>Assessment criteria</b> <i>The learner can:</i>		
1. Be able to effectively promote the consulting organisation			1.1 Develop clear, customer focused value propositions 1.2 Evaluate a range of channels for promoting the consultancy organisation 1.3 Discuss a range of factors that influence client buying decisions		
2. Know how to manage resources within a consulting practice/department			2.1 Explain the factors to consider when pricing interventions 2.2 Identify the resources and costs needed to meet set objectives 2.3 Develop appropriate controls to ensure effective management of resources		
3. Be able to lead and manage a consulting team effectively			3.1 Develop appropriate team structures to support the achievement of objectives 3.2 Deploy human resources effectively to meet set objectives 3.3 Evaluate tools and techniques used to build effective teams 3.4 Discuss the challenges of leading teams which may be remote or contain client employees		
<b>Additional Information about this unit</b>					
Unit aim(s)			This unit is about the core activities involved in managing consultancy teams and practices.		
Additional information			Proposed Assessment methodology dependent upon the circumstances:- Assignment Professional discussion Questioning		
Link to CMI Resources			<a href="#">Click here</a> to access Unit 7032 Study Support. <i>Please note you will need to be logged in to view.</i>		
Recommended Reading			<i>Please see the booklist at the end of this document.</i>		

<b>Title:</b>	Developing performance management strategies				
<b>Level:</b>	7	<b>QCA Number</b>	A/504/9068	<b>Unit Number</b>	7002V1
<b>Credit value:</b>	7	<b>Guided Learning Hours</b>	25		
<b>Learning outcomes</b>			<b>Assessment criteria</b>		
<b><i>The learner will:</i></b>			<b><i>The learner can:</i></b>		
1. Be able to set performance targets of teams to meet strategic objectives			1.1 Assess the links between team performance and strategic objectives 1.2 Evaluate tools and techniques available to set team performance targets 1.3 Assess the value of team performance tools to measure future team performance		
2. Be able to agree team performance targets to contribute to meeting strategic objectives			2.1 Analyse how to determine required performance targets within teams against current performance 2.2 Discuss the need to encourage individual commitment to team performance in achievement of organisational objectives 2.3 Relate the application of delegation, mentoring and coaching to the achievement of the organisational objectives 2.4 Evaluate a team performance plan to meet organisational objectives		
3. Be able to monitor actions and activities defined to improve team performance			3.1 Assess the process for monitoring team performance and initiate changes where necessary 3.2 Evaluate team performance against agreed objectives of the plan 3.3 Evaluate the impact of the team performance in contributing to meeting strategic objectives		
4. Be able to apply influencing and persuading skills, to the dynamics and politics of personal interactions			4.1 Determine influencing and persuading methodologies to gain the commitment of individuals to a course of action 4.2 Discuss the impact of individual dynamics, interests and organisational politics on securing the commitment of individuals to a course of action		
<b>Additional Information about this unit</b>					
Unit aim(s)			This unit is about the core activities involved in		

	managing consultancy teams and practices.
Additional information	Proposed Assessment methodology dependent upon the circumstances:- Assignment Professional discussion Questioning
Link to CMI Resources	<a href="#">Click here</a> to access Unit 7002V1 Study Support. <i>Please note you will need to be logged in to view.</i>
Recommended Reading	<i>Please see the booklist at the end of this document.</i>

<b>Title:</b>	Reviewing organisational strategy plans and performance				
<b>Level:</b>	7	<b>QCA Number</b>	F/504/9072	<b>Unit Number</b>	7006V1
<b>Credit value:</b>	9	<b>Guided Learning Hours</b>	30		
<b>Learning outcomes</b>		<b>Assessment criteria</b>			
<b><i>The learner will:</i></b>		<b><i>The learner can:</i></b>			
1. Be able to review and determine the organisational strategic aims and objectives		1.1 Identify the current strategic aims and objectives 1.2 Undertake an evaluation of the component parts of a strategic plan 1.3 Analyse the factors affecting the strategic plan			
2. Be able to identify and analyse progress towards organisational strategic aims and objectives		2.1 Apply a range of strategic analysis tools to audit progress towards strategic aims and objectives 2.2 Evaluate the expectations of all stakeholders and their influence upon the organisational strategy 2.3 Analyse, interpret and produce a structured evaluation of the organisational strategic position			
3. Be able to evaluate strategic options to support a revised strategic position		3.1 Develop a range of alternative strategic options to meet strategic aims and objectives 3.2 Justify the strategic option that meets the revised strategic position			
<b>Additional Information about this unit</b>					
Unit aim(s)		This unit is about reviewing strategic aims and objectives, analysing progress towards achievement and evaluating alternatives.			
Additional information		Proposed Assessment methodology dependent upon the circumstances:- Assignment Professional discussion Questioning			
Link to CMI Resources		<a href="#">Click here</a> to access Unit 7006V1 Study Support. <i>Please note you will need to be logged in to view.</i>			
Recommended Reading		<i>Please see the booklist at the end of this document.</i>			

<b>Title:</b>	Strategic project management				
<b>Level:</b>	7	<b>QCA Number</b>	R/504/9075	<b>Unit Number</b>	7009V1
<b>Credit value:</b>	6	<b>Guided Learning Hours</b>	20		
<b>Learning outcomes</b>			<b>Assessment criteria</b>		
<b><i>The learner will:</i></b>			<b><i>The learner can:</i></b>		
1. Understand the impact of projects and project management on strategic objectives			1.1 Assess the purpose of project planning and management 1.2 Analyse how projects impact on the strategic objectives of an organisation		
2. Understand the elements of a project process and plan			2.1 Discuss the roles of a project sponsor and other project stakeholders 2.2 Explain need to scope and identify specification to develop a project plan 2.3 Discuss the phases necessary in the construction of a project plan		
3. Understand how to implement the project plan and evaluate the outcome(s)			3.1 Explain the process of gaining project implementation agreement 3.2 Assess the methods for securing stakeholder support for project implementation and operations 3.3 Explain the evaluation process to measure project performance (on-going/hand-over) to meet strategic objectives		
<b>Additional Information about this unit</b>					
Unit aim(s)			This unit is about the development of a project plan and its impact on strategic objectives.		
Additional information			Proposed Assessment methodology dependent upon the circumstances:- Assignment Professional discussion Questioning		
Link to CMI Resources			<a href="#">Click here</a> to access Unit 7009V1 Study Support. <i>Please note you will need to be logged in to view.</i>		
Recommended Reading			<i>Please see the booklist at the end of this document.</i>		

<b>Title:</b>	Implementing organisational change strategies				
<b>Level:</b>	7	<b>QCA Number</b>	Y/504/9076	<b>Unit Number</b>	7010V1
<b>Credit value:</b>	7	<b>Guided Learning Hours</b>	25		
<b>Learning outcomes</b>		<b>Assessment criteria</b>			
<b><i>The learner will:</i></b>		<b><i>The learner can:</i></b>			
1. Understand how to apply solutions to organisational change		1.1 Identify a range of organisational change, models or frameworks 1.2 Apply a range of creative problem solving techniques to address change challenges 1.3 Identify and justify change solutions that link to organisational strategic plans			
2. Understand how to develop a change strategy using implementation models		2.1 Evaluate a range of change implementation models 2.2 Identify the criteria to select a change implementation model that supports organisational change			
3. Be able to analyse an organisational response to change		3.1 Demonstrate the use of analytical tools to monitor the progress and the effect of change 3.2 Assess monitoring and measurement techniques to change within an organisation 3.3 Analyse strategies to minimise adverse effects of change			
4. Be able to evaluate the impact of change strategies		4.1 Identify the processes to review the impact of the change 4.2 Analyse the results of the impact review 4.3 Present the findings of the change analysis			
<b>Additional Information about this unit</b>					
Unit aim(s)		This unit is about identifying and developing change strategies to meet organisational objectives.			
Additional information		Proposed Assessment methodology dependent upon the circumstances:- Assignment Professional discussion Questioning			
Link to CMI Resources		<a href="#">Click here</a> to access Unit 7010V1 Study Support. <i>Please note you will need to be logged in to view.</i>			
Recommended Reading		<i>Please see the booklist at the end of this document.</i>			

<b>Title:</b>	Leadership coaching and mentoring skills				
<b>Unit aim:</b>	This unit is about developing skills and practices that support coaching and mentoring activities across the organisation.				
<b>Level:</b>	7	<b>QCA Number</b>	M/504/9066	<b>Unit Number</b>	7020V1
<b>Credit value:</b>	7	<b>Guided Learning Hours</b>	30		
<b>Learning outcomes</b> <i>The learner will:</i>			<b>Assessment criteria</b> <i>The learner can:</i>		
1. Understand how coaching and mentoring programmes support business objectives			1.1 Evaluate the benefits of coaching to an organisation 1.2 Evaluate the benefits of mentoring to an organisation 1.3 Assess how coaching programmes support business objectives 1.4 Assess how mentoring programmes support business objectives 1.5 Develop guidelines and protocols for programmes based on accepted coaching and mentoring theory and practice 1.6 Develop a coherent, congruent statement of ethics for coaching and mentoring programmes and activities across the organisation		
2. Understand the implementation of coaching and mentoring to achieve organisational objectives			2.1 Discuss the organisational and resource implications of coaching 2.2 Discuss the organisational and resource implications of mentoring 2.3 Explain how to overcome organisational and individual resistance to the implementation of coaching 2.4 Explain how to overcome organisational and individual resistance to the implementation of mentoring		
3. Be able to devise an implementation plan			3.1 Devise an implementation plan to install coaching programmes within an organisation 3.2 Devise an implementation plan to install mentoring programmes within an organisation		
4. Be able to evaluate the impact of the coaching and mentoring plan			4.1 Evaluate the impact to an organisation of establishing coaching culture 4.2 Evaluate the impact to an organisation of establishing mentoring culture		
5. Understand how to develop skills as a leader in coaching and mentoring			5.1 Assess current skills of communications and people		



	<p>development to support personal practice of coaching</p> <p>5.2 Assess current skills of communications and people development to support personal practice of mentoring</p> <p>5.3 Identify development opportunities to meet personal skills needs and to develop own practice</p> <p>5.4 Evaluate skills and practices and produce a personal development plan in relation to coaching skills</p> <p>5.5 Evaluate skills and practices and produce a personal development plan in relation to mentoring skills</p>
<b>Additional Information about this unit</b>	
Unit aim(s)	This unit is about identifying and developing change strategies to meet organisational objectives.
Additional information	<p>Proposed Assessment methodology dependent upon the circumstances:-</p> <p>Assignment</p> <p>Professional discussion</p> <p>Questioning</p>
Link to CMI Resources	<a href="#">Click here</a> to access Unit 7020V1 Study Support. <i>Please note you will need to be logged in to view.</i>
Recommended Reading	<i>Please see the booklist at the end of this document.</i>

## Recommended reading

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### Books

This is a selection of books available for loan to CMI studying members and tutors from our Approved centres in the UK from CMI's Management Library. Go to [www.managers.org.uk/libray](http://www.managers.org.uk/libray) to place your requests.

Resource-ful consulting: working with your presence and identity in consulting change  
Izod, Karen and Whittle, Susan Rosina  
Karnac Books, 2014  
145p  
ISBN: 9781782200413

Management consultancy, 2nd ed  
O'Mahoney, Joe and Markham, Calvert  
Oxford University Press, 2013  
391p  
ISBN: 9780199645473

Flawless consulting a guide to getting your expertise used  
Block, Peter  
Pfeiffer, 2011  
323p  
ISBN: 9780470620748

Essential tools for management consulting: tools, models and approaches for clients and consultants  
Burtonshaw-Gunn, Simon A  
John Wiley, 2010  
147p  
ISBN: 9780470745939

The management consultant: mastering the art of consultancy  
Newton, Richard  
Financial Times Prentice Hall, 2010  
298p  
ISBN: 9780273730873

The Seven C's of consulting: the definitive guide to the consulting process  
Cope, Mick  
Financial Times Prentice Hall, 2010  
364p  
ISBN: 9780273731085

Consulting for dummies  
Nelson, Bob; Economy, Peter and Albion, Phillip  
John Wiley, 2009  
344p  
ISBN: 9780470713822

The consultants quick start guide: an action plan for your first year in business  
Biech, Elaine  
John Whiley, 2009  
249p  
ISBN: 9780470372919

Winning consultancy business

Pope, John

HotHive Books, 2009

96p

ISBN: 9781906316310

Management consultancy: the official career guide to the profession

Cambridge Market Intelligence 2008

141p

ISBN: 9781862131347

Management consulting: delivering an effective project

Wickham, Philip and Wickham, Louise

Financial Times Prentice Hall, 2008

313p

ISBN: 9780273711841

The essential management toolbox: tools models and notes for managers and consultants

Burtonshaw-Gunn, Simon A

John Wiley, 2008

360p

ISBN: 9780470518373

Practical management consultancy

Markham, Calvert

Wolters Kluwer, 2007

274p

ISBN: 9781841409702

Fearless consulting: temptations risk and limits of the profession

De Haan, Erik

John Wiley, 2006

203p

ISBN: 0470026952

How to build a successful consulting practice

Phillips, Jack

McGraw-Hill, 2006

254p

ISBN: 0071462295

### **CMI Checklists**

Using consultants (003)

Setting up as a consultant (093)

### **Contact CMI's Information Services**

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The Information Centre is open to visitors Mon – Fri 9am - 5pm