



INSTITUTE OF  
CONSULTING

# Diploma in Management Consultancy



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## **Diploma in Management Consultancy**

### **Introduction**

This qualification develops the knowledge, skills and behaviours to operate as a Management Consultant. It is intended for people who want to enter management consultancy from a functional discipline, or for those who wish to develop the skills and knowledge needed in the field of management consultancy.

### **Aims**

To help you learn, as a developing management consultant, about:

- professional practice
- professional development
- organisation structure and culture
- entry & diagnosis
- interpersonal interaction
- group techniques
- communicating with impact
- managing consultancy interventions
- effective project management
- tools and techniques for effective consulting

### **Prior Learning**

It is recommended that learners should be educated to degree level or equivalent or have a minimum of five years business experience.

### **Assessment**

You will be assessed on your achievement of the learning outcomes. The assessment programme is designed to test your knowledge and understanding of the whole qualification. To achieve this qualification, learners must meet all of the learning outcomes.

Any material you generate as part of this qualification may be counted as evidence towards the Certified Management Consultant award offered by the Institute of Consulting.

### **Awarding Body**

This qualification is offered by the Institute of Consulting which is a wholly owned division of the Chartered Management Institute which is the awarding body. Further details about the qualification can be obtained by contacting either organisation.

### **Support and Help**

As a student member of CMI, suggested reading lists can be found on the Institute of Consulting website, <http://www.icon consulting.org.uk> or you can access a wide variety of help, information, reading lists and management texts, via [www.managers.org.uk/students](http://www.managers.org.uk/students).

## Guided Learning Hours

These are used as a notional measure of the substance of a qualification, and help Centres determine what teaching and learning resources are going to be needed to support learners. They are based on an estimate of the time that might actually be spent by the learner being taught or instructed, as well as time learners spend on structured learning such as directed assignments, assessments on the job or supported individual study or practice. So as a learner you can use these Guided Learning Hours to help you plan the effective use of your time to achieve the unit outcome.

<b>Diploma in Management Consultancy</b>	<b>Guided Learning Hours</b>
DMC01 Professional Practice	15
DMC02 Professional Development	15
DMC03 Organisation Structure and Culture	30
DMC04 Entry & Diagnosis	30
DMC05 Interpersonal Interaction	20
DMC06 Group Techniques	20
DMC07 Communicating with Impact	20
DMC08 Managing Consultancy Interventions	30
DMC09 Effective Project Management	30
DMC010 Tools and Techniques for Effective Consulting	30
<b>Qualification total</b>	<b>240</b>

## Unit DMC 01 Professional Practice

### Overview

This Unit focuses on the professional standards, conduct and ethics which management consultants should adopt. It explores in depth what is meant by professional standards and behaviours, and how they can be applied in practical situations.

### Aims

To help you learn how to:

1. Recognise how to operate with professionalism and integrity in all aspects of your role.
2. Apply professional standards and appropriate professional behaviours in practical situations.
3. Recognise and take an appropriate course of action when faced with ethical dilemmas.

### Unit Content

#### Applying professional standards and behaviours

Understanding:

- the reasons for, and importance of, representing your profession responsibly
- the range of professional behaviours needed by the individual consultant – such as analytical and pro-active thinking, the ability to deal with complexity and take responsibility, interpersonal capability, effective delivery and the ability to undertake personal growth
- the principal consulting skills and technical knowledge required for effective performance
- the purpose, role, and impact of professionalism, integrity, and working within codes of conduct and ethical guidelines in the best interests of the client

How to:

- apply diversity, integrity and confidentiality in practice
- engender trust and respect from professional colleagues and clients

#### Handling ethical dilemmas

Understanding:

- the value of Codes of Professional Conduct in the management of ethical dilemmas
- what constitutes an ethical dilemma

How to:

- recognise ethical dilemmas
- determine an appropriate course of action when confronted with an ethical dilemma

## **Learning Outcomes**

When you have completed this unit, you will know how to:

1. Define the professional and ethical standards to which consultants should work.
2. Explain how professional and ethical standards of behaviour affect how the consultant can engender respect from colleagues and clients.
3. Describe the types of ethical dilemma which might confront you in the course of your professional work, and explore appropriate courses of action which could be taken to resolve them.

## **Links to the Management Consultancy Competence Framework**

Professional Behaviours – Professionalism and Ethics

## Unit DMC 02 Professional Development

### Overview

This Unit will give you a framework to evaluate your current knowledge, skills and behaviours to plan your future development and support others in their development.

### Aims

To help you learn how to:

1. Evaluate your current behaviours, skills and knowledge.
2. Develop a personal plan which sets out the knowledge, skills and professional behaviours you need to develop to become an effective management consultant.
3. Give and receive performance feedback effectively.
4. Support and encourage positive behaviours in others.
5. Build a personal network.

### Unit Content

#### The challenges of the management consultant's role

Understanding:

- the structure and historical development of the management consultancy market
- the current market for management consultancy, including issues such as competition, types of consultancy interventions, and relevant legislative, economic, social and political factors, different types of consultancy (e.g. internal, external, public sector) and how their products and services may differ
- how the management consultancy role can be defined, and which typical responsibilities and activities are included
- the key stages in a consultancy career path, and the typical skills, knowledge and behaviours required at each stage of development
- the pitfalls, risks and challenges of the consultancy role

#### Personal professional development

Understanding:

- the importance of personal growth and continuing professional development

How to:

- review and reflect on your learning and development, using tools such as the Institute of Business Consulting's Competence Framework (Appendix 1)
- undertake a self-assessment to determine your current abilities and development needs
- develop, implement, review and update your personal action plan for learning and self-development

## Developing self and others

Understanding:

- the links between organisational effectiveness and human resource development
- the importance of giving constructive feedback and getting feedback from others, (including clients), on your and other team members performance and how to encourage, enable and use such feedback in a constructive way

How to:

- select and implement appropriate development activities for yourself and others
- recognise the different forms of verbal and non-verbal behaviour and their use in managing yourself and others
- recognise the impact of your behaviour on others
- manage your own emotions and those of others

## Building a personal network

Understanding:

- the value and importance of a personal network in terms of personal development, client interface and career progression

How to:

- evaluate your current network, identify significant gaps and plan how to overcome the deficiencies
- build and maintain networks effectively

## Learning Outcomes

When you have completed this unit, you will know how to:

1. Produce a personal development plan, based on your self-assessment against the skills, knowledge and behaviours required by management consultants which you can use to manage your development.
2. Support the development of others effectively to meet stated aims and objectives.
3. Identify your current network, and develop and implement a plan to strengthen and improve it.

## Links to the Management Consultancy Competence Framework

Professional Behaviours – Personal Growth/ Professionalism and Ethics  
Market Capability and Knowledge  
Building and Sustaining Relationships

## Unit DMC 03 Organisation Structure and Culture

### Overview

This Unit is about how consultants interact effectively and bring about change within a variety of organisations. It explains some of the core business structures, processes, management, disciplines and culture you are likely to encounter in your role as a management consultant. It explores the principles and challenges of business transformation and embedding change in an organisation.

### Aims

To help you learn how to:

1. Identify the features of internal and external operating environments and how they impact on the client organisation.
2. Identify the linkages between organisational culture, structure and the achievement of organisational objectives.
3. Clarify how you can best work with the structure and culture within any client organisation.

### Unit Content

#### Features of internal and external operating environments

Understanding:

- organisation values, structures and objectives and how they affect the performance of the organisation
- how cultures in organisations evolve, the bases of power within organisations and differing models for explaining organisational cultures
- the structure of your own and client organisations and the responsibilities of people within them for work activities and decision making
- the organisational values and objectives of the client organisation which have a bearing on the recommendations you are making and how to interpret their implications
- the objectives, policies and legal requirements of organisations and their implications for your work

How to:

- analyse the internal and external operating environments of organisations
- evaluate the impact of evolving culture on the organisation
- identify and evaluate the role of different power bases within organisations

#### Organisational change

Understanding:

- how organisations grow and develop, and what the impact of events such as outsourcing, merger and downsizing have on organisational growth
- the principles of modelling to enable evaluations to be made of the stage of growth of organisations

## **Working with clients and their organization**

How to:

- recognise readiness for change in an organisation and how to facilitate its readiness for change
- meet the challenges of change delivery and management
- manage the impact of your consultancy interventions on the wider organization

## **Learning Outcomes**

When you have completed this unit, you will know how to:

1. Analyse and evaluate organisational structure and culture.
2. Identify the stages of growth of a client organisation.
3. Identify how the development of the structure and culture has impacted on the growth and present state of the organisation.

## **Links to the Management Consultancy Competence Framework**

Market Capability and Knowledge

Professional Behaviours - Complexity and Responsibility

## Unit DMC 04 Entry and Diagnosis

### Overview

This Unit is about the initial entry and diagnosis stages of the consultancy cycle. It explores how to develop and nurture a client relationship and how to identify and scope client needs. The Unit also addresses the typical contract of a client proposal including contractual and legal arrangements.

### Aims

To help you learn how to:

1. Establish an effective working relationship with your client.
2. Understand and scope client needs.
3. Understand the contents of a client proposal and the need to operate within the contractual terms of engagement.

### Unit Content

#### Effective working relationships

Understanding:

- the reasons for, and methods of, establishing credibility with your client
- the importance of professionalism, ethics and confidentiality in building and maintaining client relationships
- the principles of consultation and negotiation in managing clients
- methods of engaging your client
- the importance of effective communication methods in working relationships with clients
- what quantitative and qualitative information is essential to your role and responsibilities in working with clients
- how clients own competences and behaviours can be leveraged to contribute to a successful outcome of the intervention

How to:

- research your client's needs effectively
- develop effective collaborative relationships with clients
- establish and maintain client expectations throughout the relationship
- establish credibility with your clients

#### Establishing need

Understanding:

- the values and objectives of the client organisation which have a bearing on the planned intervention
- the importance of acknowledging and respecting clients' views and perspectives
- the importance of identifying the client issue, applying a structured approach and selecting appropriate analytical tools and techniques to meet this need
- the methods of identifying, validating, filtering and sourcing the knowledge and information needed to take decisions in different contexts
- the need to scope interventions and agree clear contracts with clients
- the importance of confidentiality when dealing with sensitive information

How to:

- identify the key stakeholders
- identify and articulate the client need effectively
- apply a range of recognised data gathering, problem solving and analytical tools and techniques in evaluating client need
- draw conclusions on the basis of analysing information both qualitatively and quantitatively
- scope potential interventions and projects

### **Contents of client proposals and contractual terms of engagement**

Understanding:

- the typical steps to be taken in developing a proposal for a client and typical content of a proposal
- the need to qualify the opportunity to your organisation
- the need to secure client buy-in
- the principles of risk appraisal and benefit analysis
- the impact on proposals of legal and contractual requirements
- your organisation's pricing strategy and fee structure
- quality standards and approaches in the consultancy context

How to:

- source and build an effective delivery team
- consult and negotiate with clients in defining and agreeing proposals
- handle sensitive information in proposals effectively
- budget time and resources effectively
- manage the contracting process effectively
- communicate effectively with clients, team members and colleagues during the negotiation and contracting process

### **Learning Outcomes**

When you have completed this unit, you will know how to:

1. Determine and apply an effective client communication strategy.
2. Define why it is important to build effective relationships with clients and outline the techniques you would use to establish credibility with a client.
3. Describe the stages in determining client need and how you would handle confidential and sensitive information during this process.
4. Produce costed proposals for interventions which meet your clients' needs and your organisation's operational and profit requirements.

### **Links to the Management Consultancy Competence Framework**

Client Focus  
Professional Behaviours

## Unit DMC 05 Interpersonal Interaction

### Overview

This Unit will develop your ability to interact and empathise effectively with others to achieve desired outcomes of mutual benefit. It focuses on personal awareness helping you develop your personal impact, negotiation and influencing skills.

### Aims

To help you learn how to:

1. Interact with others to establish and maintain productive working relationships.
2. Present yourself confidently.
3. Present alternative or challenging views effectively engaging and influencing others.
4. Understand alternative perspectives and how to handle them.

### Unit Content

#### Productive working relationships

Understanding:

- the principles and processes of effective communication and interaction and how to apply them in the consultancy context
- the importance of honouring commitments to clients
- the importance of acknowledging and respecting clients' views and perspectives
- the importance of enabling and encouraging clients to make recommendations for, and improvements to, activities and interactions

How to:

- influence effectively and make effective use of facts and data
- engage contributions from others formally and informally

#### Personal impact

Understanding:

- the impact of positive and negative behaviours on clients, team members and colleagues
- the effects of language, behaviour and dress on internal and external relationships

How to:

- work with people individually and in groups at all levels within client organisation
- apply listening and questioning techniques to understand issues and problems
- recognise different forms of verbal and non-verbal behaviour and their appropriate uses
- present yourself confidently
- present bad news and challenges to the status quo, and handle negative reactions effectively

## **Learning Outcomes**

When you have completed this unit, you will know how to:

1. Describe different types of verbal and non-verbal communication and behaviour and describe how behaviour impacts on others.
2. Assess your own personal impact on consultancy clients, and identify opportunities for improvement and development.
3. Explain how you would approach a difficult client situation, and describe the skills and techniques you would use to achieve a positive outcome.

## **Links to the Management Consultancy Competence Framework**

Interpersonal Interaction  
Building and Sustaining Relationships

## Unit DMC 06 Group Techniques

### Overview

This Unit builds the skills required to work effectively with groups and in team situations. It studies the behaviours of high impact teams, and tools and techniques to manage group processes.

### Aims

To help you learn how to:

1. Understand group dynamics.
2. Recognise the attributes and behaviours of a high impact team.
3. Contribute constructively to group situations.

### Unit Content

#### Group dynamics

Understanding:

- group dynamics, and the impact of the group on its members
- how the group influences decision-making

How to:

- use group dynamics to achieve the required outcomes
- minimise negative effects of group dynamics in the consultancy context

#### High impact teams

Understanding:

- the concept and characteristics of high impact teams
- which situations are most conducive to the effective use and development of high impact teams

How to:

- nurture high impact teams to maintain their effectiveness
- deploy and manage high impact teams to achieve the required outcomes
- manage the expectations of members of high impact teams

#### Contributing to group situations

Understanding:

- the principles of group management and the roles people adopt in a group environment
- the consultant's role in directing groups and teams in an effective and appropriate way
- the need for the consultant to be able to adopt a number of different roles within the group to ensure the required outcomes are achieved

How to:

- provide effective direction to groups
- act as a facilitator
- recognise when the consultant needs to adopt a different role to ensure agreed objectives are met

### **Learning Outcomes**

When you have completed this unit, you will know how to:

1. Explain how the consultant can use group dynamics to achieve agreed outcomes.
2. Describe the role of the facilitator, and describe situations where it is an appropriate role for the consultant to adopt.

### **Links to the Management Consultancy Competence Framework**

Building and Sustaining Relationships

## Unit DMC 07 Communicating with Impact

### Overview

Effective communication skills are fundamental to the consultant's skills set. This Unit considers how to convey messages to your client successfully and with impact.

### Aims

To help you learn how to:

1. Select communication methods appropriate to the issues and contexts.
2. Convey your ideas and recommendations in writing.
3. Present your ideas with impact.

### Unit Content

#### Communication methods

Understanding:

- the importance of effective communication
- the principles and processes of effective communication methods and their impact on productive working relationships with clients, team members, colleagues and managers
- the impact of the audience on selecting communication methods
- the impact of organisational culture and expectations on communication styles and methods
- the impact of personal style on effective communication

How to:

- select the communication method and style most appropriate to the situation, audience and context
- organise and structure written communications
- present written communications in a style, format and medium appropriate to the reader
- plan and manage meetings effectively

#### Presenting with impact

Understanding:

- how people listen, see and understand
- the principles of presenting information in visual form
- techniques for engaging audience attention

How to:

- convey ideas and thoughts in a clearly focused way
- select and apply presentation tools and techniques
- engage and manage your audience

## **Learning Outcomes**

When you have completed this unit, you will know how to:

1. Review the range of communication methods available to the management consultant.
2. Describe how you would plan, manage and follow up on a formal meeting with a client.
3. Prepare and produce formal written communications and reports for clients.
4. Plan and give a formal presentation, using visual aids and supporting material, to a group from a client organisation.

## **Links to the Management Consultancy Competence Framework**

Building and Sustaining Relationships

## Unit DMC 08 Managing Consultancy Interventions

### Overview

This Unit is about managing consultancy interventions. It builds on the concept of the consultancy cycle considering a range of approaches to consultancy and the phases of the consultancy process. It examines alternative models, looking at different phases of consultancy interventions identifying the typical inputs, deliverables, risks and issues at each stage of the cycle. It explores the complexity of the operating environment and identifies some of the strategies and tools used to manage each stage effectively.

### Aims

To help you learn how to:

1. Define different approaches to consultancy.
2. Choose an appropriate intervention style.
3. Recognise the inputs, deliverables and skills required at each stage of the cycle, producing outputs where appropriate.
4. Identify some of the risks associated with each stage of the cycle.
5. Identify strategies and tools for managing the cycle effectively.

### Unit Content

#### Consultancy model

Understanding:

- the diversity of consultancy interventions and approaches
- the principles and stages of a model for managing the consultancy cycle
- the consultancy cycle and typical inputs and deliverables for each stage of the cycle
- the types of problems, risks and issues which may arise during each phase
- the impact of the consultant's personal approach on the consultancy cycle

How to:

- recognise and apply consultancy models and approaches to add value and manage consultancy interventions more effectively

#### Identifying effective intervention management strategies

Understanding:

- the importance of scoping interventions effectively and agreeing a clear contract with clients
- the need for interventions to have a clear, planned structure

How to:

- establish and maintain client expectations in a constructive manner
- ensure an effective assignment team

## **Learning Outcomes**

When you have completed this unit, you will know how to:

1. Describe the stages in the consultancy cycle and the risks associated with each stage.
2. Describe a model for managing the consultancy cycle and how you would use the model in one of your interventions with clients.
3. Identify the key activities involved at each stage in the consultancy cycle, and their application in achieving the required outcomes.
4. Describe the implications and strategies for operating effectively at each stage of the cycle.

## **Links to the Management Consultancy Competence Framework**

Market Capability and Knowledge  
All Consulting Competences

## Unit DMC 09 Effective Project Management

### Overview

This Unit focuses on how to manage consultancy projects effectively. It introduces the different skills and techniques required at each stage of the consultancy cycle and the importance of risk and quality assurance in managing the project outcomes.

### Aims

To help you learn how to:

1. Develop a project management strategy.
2. Develop a set of success criteria for a project.
3. Establish suitable governance and support structure for a project.
4. Identify and manage risk and quality issues.

### Unit Content

#### Project strategy and lifecycle

Understanding:

- where programmes and projects fit within organisational management
- the relationship between programme, project and product lifecycles, and technical methodologies
- the typical lifecycle of a project from conception to withdrawal, post programme and project evaluation and review

How to:

- select a project strategy to manage a project throughout its lifecycle
- define success criteria for a project and measure performance effectively
- identify the needs and expectations of stakeholders
- define and populate suitable management organisation structures for a project

#### Project methodologies

Understanding:

- the range of standard methodologies used to manage projects
- the use of Bodies of Knowledge in project design and management
- the importance of planning and managing a project and the impact of poor project planning and management on consultancy projects
- the importance of developing an effective project management environment

How to:

- select and tune project methodologies and lifecycles for a specific project
- develop a communications strategy to keep stakeholders informed appropriately

#### Effective project delivery

Understanding:

- the importance of planning and managing a project and the impact of poor project planning and management on consultancy projects
- the components of a project plan

- the need for effective budgeting of time and resources
- the role and importance of quality assurance
- risk mitigation and management strategies
- tools and techniques for issue identification and management
- the management consultant's personal role in effective project delivery including upward management and client management techniques

How to:

- apply personal time management techniques within the project context
- establish an effective infrastructure to ensure project delivery
- identify and quantify likely risks at each stage of the project lifecycle
- set up and ensure an effective quality assurance framework for your project

### **Learning Outcomes**

When you have completed this unit, you will know how to:

1. Explain the principles and methods of programme and project management and evaluate their use within the consultancy context.
2. Describe the key components of a project to enable effective delivery of a consultancy intervention.
3. Describe the factors affecting quality of delivery within a consultancy project context.
4. Explain the need for an effective infrastructure to ensure project delivery.

### **Links to the Management Consultancy Competence Framework**

Achieving Sustainable Results

Professional Behaviours – Delivery Effectiveness

## Unit DMC 010 Tools and Techniques for Effective Consulting

### Overview

This Unit aims to develop your awareness and application of core generic tools and techniques which will be relevant for many consultancy projects and also to develop a depth of understanding and application of three or more tools and techniques which are relevant for your area of specialisation, market or role.

### Aims

To help you learn how to:

1. Diagnose and analyse client issues using a variety of tools and techniques.
2. Select appropriate tools and techniques for client projects.
3. Develop an awareness of techniques in creative thinking, problem solving to generate solutions and support development of recommendations.
4. Recognise the benefits and limitations of a range of tools and techniques.
5. Apply a range of tools and techniques in practice.

### Unit Content

#### Structured knowledge, research and analysis

Understanding:

- the importance of identifying the client issue, applying a structured approach and selecting appropriate analytical tools and techniques to meet this need
- the methods of identifying, validating, filtering and sourcing the knowledge and information needed to take decisions in different contexts
- the importance of confidentiality when dealing with sensitive information
- the resources you have available to you and the role of effective networks in research

How to:

- identify the client need effectively
- draw conclusions on the basis of analysing information both quantitatively and qualitatively

#### Generic tools and techniques

Understanding:

- the principal tools and techniques (such as those for problem-solving, data analysis, creative thinking and benchmarking which can be used to generate solutions or develop recommendations) which are relevant across a wide range of consultancy applications
- the benefits, limitations and appropriate application of the principal tools and techniques

How to:

- select generic tools and techniques appropriate to the consultancy context
- use and adapt selected tools and techniques to achieve agreed outcomes
- document applications of generic tools and techniques

## **Expert tools and techniques**

Understanding:

- the importance of selecting and using appropriate expert tools and techniques (such as performance management, benchmarking, modelling, business process improvement, etc) for the specific consultancy context
- the principles which underpin the expert tools and techniques
- the benefits, and limitations of expert tools and techniques

How to:

- evaluate the appropriateness of tools and techniques to a given consultancy situation
- use expert tools and techniques to analyse and diagnose client needs, and to find and present solutions and recommendations
- keep appropriate records of adaptations and fine tuning of tools and techniques for evaluation and comparison
- assess the effectiveness of selected tools and techniques in achieving the desired outcomes

## **Learning Outcomes**

When you have completed this unit, you will know how to:

1. Identify and apply appropriate tools for a given client situation.
2. Describe how you would manage diagnosis and analysis effectively in a given client context.
3. Prepare and produce your findings, conclusions and recommendations to the client following research, analysis and diagnosis.
4. Compare the effectiveness of different tools and techniques, and define criteria which you would adopt in determining their suitability for different client situations.

## **Links to the Management Consultancy Competence Framework**

Applying Expertise and Knowledge

Appendix 1

Management Consultancy Competence Framework Overview Diagram

<table border="1"> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </table> <b>Market Capability and Knowledge</b>								<b>5.0</b>	Technical Discipline			Sector Specialism		
			Examples			Examples								
			Finance	Strategy	HR	Public		Internal	Telecoms					
			IT	Production	Marketing	Financial		Not for Profit	Life Sciences					
		Business Understanding and External Awareness												
<b>Consulting Competence</b>		<b>1.0</b>	Client Focus											
		<b>2.0</b>	Building and Sustaining Relationships											
		<b>3.0</b>	Applying Expertise and Knowledge											
		<b>4.0</b>	Achieving Sustainable Results											
<b>Professional Behaviours</b>		<b>B</b>	Analytical and Pro-active Thinking	<b>C</b>	Complexity and Responsibility	<b>D</b>	Interpersonal Interaction	<b>E</b>	Delivery Effectiveness	<b>F</b>	Personal Growth			
		<b>A</b>	Professionalism and Ethics											