CMI Level 7 Professional Consulting Top Up Document

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Introduction

The aim of this document is to give Learners who have previously completed the Institute of Consulting (IC) Diploma in Management Consulting the opportunity to achieve the new QCF qualifications, via a top up programme.

CMI have conducted a mapping exercise of the IC Diploma in Management Consulting qualification against the new QCF qualifications. From that mapping exercise, CMI have created individual Assignments Briefs, for each of the QCF units. Each assignment brief will set out tasks that the Learner is required to complete, in order to achieve the new and amended QCF assessment criteria.

These assignments can be marked within the CMI Approved Centre, or sent to CMI for external verification, at a charge of £30 per unit per learner.

The Learner registration fee the QCF qualification will be as per CMI published Fee List.

Top Up Summary

Diploma in Management Consulting

Learners who have previously been awarded the Diploma in Management Consultancy would have been required to complete the following units:-

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

Top Up requirements for the CMI Level 7 Award in Professional Consulting (QCF)

In order to be awarded CMI Level 7 Award in Professional Consulting (QCF), learners are required to complete the Top Up Assignment Brief the selected unit.

Rules of Combination for the 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

Top Up requirements for the CMI Level 7 Certificate in Professional Consulting (QCF)

In order to be awarded CMI Level 7 Certificate in Professional Consulting (QCF), learners are required to complete the Top Up Assignment Brief for the selected units.

Rules of Combination for the 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

Top Up requirements for the CMI Level 7 Diploma in Professional Consulting (QCF)

In order to be awarded CMI Level 7 Diploma in Professional Consulting (QCF), learners are required to complete the Top Up Assignment Briefs for all mandatory units plus either complete the Top Up Assignment Brief for units 7024, 7025, 7028, 7029, or 7032 or complete the required assessment for the additional Management and Leadership units, depending on the optional unit selected.

Rules of Combination for the 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	Strategic performance management	7	7
7006V1	Organisational direction	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

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

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

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).

Accessibility of CMI qualifications

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.

Word count is a Max of 600 range 500 – 600 words

Unit 7024 (Top Up) - Professional practice

Introduction

This unit is about the professional and ethical standards to which a management consultant should work.

Scenario

Learners may use their own employment context, or that of another organisation with which they are very familiar, to base their assignment. However, in the case that they are not able to do so, please use the below scenario: -

You are employed as a management consultant and as part of your role you have been asked to review the performance and behaviour of the consultants within the organisation. The aim is to improve the professional and ethical standards currently inherent within the company and examine how the organisational culture and values may impact of the behaviour of consultants. The task will involve reviewing the importance of codes of conduct, examining any possible dilemmas consultants may face and expected behaviour to ensure high professional standards.

Task 1:

The organisational culture can affect the behavioural norms of consultants in terms of ethical conduct and professionalism. Critically evaluate how the organisational culture and values may promote a high standard of ethical conduct from its consultants and the impact this could have.

Guideline word count: 500 - 600 words

A.C. 3.3 Critically evaluate the role of an organisation's cultural values in promoting a high standard of ethical conduct from its consultants

Word count is a Max of 1900 range 1400 – 1900 words

Unit 7025 (Top Up) - Professional development in consulting

Introduction

This unit is about the professional and ethical standards to which a management consultant should work.

Scenario

Learners may use their own employment context, or that of another organisation with which they are very familiar, to base their assignment. However, in the case that they are not able to do so, please use the below scenario: -

You are employed in a medium sized organisation as a management consultant. In order for your organisation to develop its competitive advantage you have been asked to review current practice within the organisation to include the skills and behaviours of staff. Part of your review is to examine the link between the core competences of staff and the achievement of organisational objectives. You will need to create action and development plans that can be implemented and measured for effectiveness against organisational objectives. An understanding of possible benefits will need to be identified and the importance of continual improvement explored and critically evaluated.

Task 1:

The strategic direction of organisations employing consultants are subject to changes to reflect market demands in the macro environment. Explain how emerging trends and challenges impact upon the strategic direction of the consultants own organisation.

Guideline word count: 200 - 300 words

A.C. 1.1 Explain how emerging trends and challenges impact upon the strategic direction of the consultants own organisation

Task 2:

Write a report to contain the following information:-

Section 1
Human resources can be viewed as the organisations 'best asset', identify three methods an organisation can use to assess skills, behaviours and competencies of teams and individuals and evaluate how each method can be conducted in a fair and objective manner.

Section 2
Select a team project/live real work issue and identify the individuals which make up the team who will be working on this. Construct a team development plan to identify skills and attributes required to achieve the project/work issue and also a personal development plan for one member of the team to ensure they can contribute to the success of the project. Consider communication skills to achieve work to set deadlines and reliance of individual and team skills to meet work tasks, SMART targets to show development needs should be included.

Section 3

Describe how organisational culture aimed at encouraging continual professional development (CPD) can impact on the performance of the organisation/consultancy practice.

Guideline word count: 600 - 800 words

A.C.2.2 Evaluate methods of assessing, skills, behaviours and competencies of teams and individuals fairly and objectively
A.C.2.3 Construct personal development plans at both team and individual level
A.C.2.5 Discuss the effects of a culture of encouraging continual professional development (CPD) on the performance of an organisation/consultancy practice

Task 3:

Consider why an organisation employing consultants would develop personal networks and assess the potential benefits this may bring to the consultant, organisation and clients. Identify a minimum of two existing networks and evaluate the effectiveness of each in contributing to personal and organisational objectives

Guideline word count: 600 - 800 words

A.C 3.2 Assess the benefits to the consultant's organisation of developing personal networks
A.C.3.3 Evaluate the effectiveness of existing networks in contributing to personal and organisational objectives

Word count is a Max of 1400 range 1100 – 1400 words

Unit 7026 (Top Up) - Organisational structure and culture

Introduction
This Unit is about how an organisation's structure and culture affects that organisation and the work of the consultant

Scenario

Learners may use their own employment context, or that of another organisation with which they are very familiar, to base their assignment. However, in the case that they are not able to do so, please use the below scenario: -

You are employed as a management consultant and have been asked to research a range of client's organisations to identify how the different structures and cultures may impact on your role. As part of your analysis you have to consider the link between structure and culture and clients achieving their organisational objectives. You should consider the varying aspects of culture and structure and include internal and external influences, stakeholders, legal compliance etc.

Task 1:

Select four tools and models that a consultant may use when analysing the current culture of an organisation. For each model/tool critically evaluate how effective they are at analysing organisational culture.
If organisational culture does not support organisational objectives describe six possible effects this may have for the organisation, staff and any other relevant stakeholders.

Guideline word count: 600 - 700 words

A.C.2.4 Critically evaluate a range of tools and models that a consultant may use when analysing the current culture of an organisation
A.C.2.5 Describe the effects of a culture which does not support organisational objectives

Task 2:

Identify two client organisations with differing structures and cultures. Assess the impact on the consultancy intervention for each organisation explaining how the structure and culture alters the activities of the consultant.
Describe the role the consultant should have when supporting change to organisational culture and structure and how resistance to change can be managed effectively.

Guideline word count: 500 - 700 words

A.C. 3.1 - Assess the impact of different cultures and structures within client organisations on the consultancy intervention
A.C.3.4 Discuss the role of the consultant in supporting change to organisational culture and structure

Word count is a Max of 2400 range 1700 – 2400 words

Unit 7027 (Top Up) - Entry and diagnosis

Introduction
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

Scenario

Learners may use their own employment context, or that of another organisation with which they are very familiar, to base their assignment. However, in the case that they are not able to do so, please use the below scenario: -

You are employed as a management consultant and have been asked to examine how client/consultant relationships can be further developed to ensure positive outcome for all. Part of your task is to review how the client competencies can impact on the development of a successful intervention and which stakeholders need to be included at the initial stages of the intervention.

Task 1:

State three tools and techniques that can be used to establish positive working relationships and credibility with clients and critically evaluate how effective they are.
Assess the impact of the client/consultant on two different consultancy interventions

Guideline word count: 300 - 450 words

A.C.1.2 Critically evaluate a range of tools and techniques that can be used to establish positive working relationships and credibility with clients
A.C.1.3 Assess the impact on consultancy interventions of consultant/client relationships

Task 2:

Identify four key individuals in the client and consulting organisation and analyse their information requirements and levels of information access needed to ensure suitable communication is achieved.
Select four tools and methods which may be used to achieve effective communication with clients, stakeholders and consulting organisations. Evaluate each of the four tools or methods to judge how effective they are in communicating with clients, stakeholders and consulting organisations.
Critically evaluate the four chosen methods for information collection and explain why information sources need to be valid and reliable

Guideline word count: 500 - 700 words

A.C. 2.2 Analyse the information requirements and levels of information access for key individuals within consulting and client organisation

A.C 2.3 Evaluate tools and methods of effective communication within clients, stakeholders and consulting organisations
A.C.3.2 Critically evaluate sources of information and methods of researching client's issue

Task 3:

Describe how a consultant can work with a client to agree a problem statement/scoping document and why agreement between the consultant and client is important.
When developing the scoping document explain the importance of identifying key constraints and success criteria at the start of the process.

Guideline word count: 400 – 550 words

A.C 3.4 Explain how to agree a problem statement/scoping document with the client
A.C. 3.5 Assess the importance of identifying key constraints and/or criterion for success in scoping client needs

Task 4:

Once the consultant has agreed a scoping document with the client explain the process for qualifying the proposal with the consultants own organisation.
Describe key contents which may be included within the proposal document.
Assess the impact client competencies may have on the development of the proposal, consider new and experienced clients and how this can affect the speed of development.
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Guideline word count: 500 – 700 words

A.C.4.1 Explain the process for qualifying the proposal with the consultants own organisation
A.C.4.2 Discuss the typical contents of a proposal document
A.C.4.4 Assess the impact of client competencies on proposal development

Word count is a Max of 2400 range 1700 – 2400 words

Unit 7028 (MC Top Up) - Group dynamics and facilitating skills

Introduction

This Unit is about the impact of group dynamics and how to strategically lead groups in a consulting context. Also covered are strategies for developing and maintaining productive working relationships within the consultant organisation.

Scenario

Learners may use their own employment context, or that of another organisation with which they are very familiar, to base their assignment. However, in the case that they are not able to do so, please use the below scenario: -

You are a senior manager, leading and supporting a team of consultants. Your team is responsible for delivering a consultancy project that supports organisational objectives.

Task 1:

In order to investigate the impact of group dynamics on the consultancy projects you deliver, explain how you will create a strategy that will improve the overall performance of consultancy projects so that skills can be developed to produce a high impact team

Guideline word count: 200 - 350 words

A.C. 1.3 - Create a strategy to develop the skills required for a high impact team

Task 2:

Produce a report that considers the various roles required of a successful consultant. Within the report, address the following areas:

Evaluate the impact of the role of the consultant as a leader in ensuring that the project meets its objectives.

Outline the different roles that the consultant may have to adopt in order to lead an effective team or group.

Outline the challenges involved for the consultant in dealing with diverse teams or groups within a project and evaluate the techniques used to manage these situations.

Guideline word count: 1,000 - 1,200 words

A.C. 2.1 - Evaluate the role of the consultant as a leader in ensuring a consultancy/project team achieves its objectives

A.C. 2.3 - Discuss the different roles a consultant may be required to adopt to ensure the effectiveness of the group

A.C. 2.5 - Evaluate the challenges in managing a diverse group

Word count is a Max of 1900 range 1200 – 1900 words

Unit 7029 (Top Up) - Communication strategies for consulting

Introduction

This Unit considers the importance of a communication strategy to the success of an intervention and the importance of effectively communicating the results of interventions.

Scenario

Learners may use their own employment context, or that of another organisation with which they are very familiar, to base their assignment. However, in the case that they are not able to do so, please use the below scenario: -

You are a senior manager, leading and supporting a team of consultants. Your team is responsible for effectively communicating the results of an intervention in line with organisational objectives.

Task 1:

You are responsible for co-ordinating the communication strategy for the consultancy intervention. Analyse the various information requirements and the levels of information access required in order to successfully deliver the consultancy intervention.

Guideline word count: 300 - 500 words

A.C. 2.3 - Analyse the information requirements and levels of information access required for the consultancy intervention

Task 2:

Critically evaluate the impact that verbal and non verbal communication skills have on the achievement of organisational objectives and on developing strong working relationships within your organisation.

By referring to at least two examples, discuss how verbal and non verbal skills have been used to overcome difficult situations in order to effectively achieve organisational objectives.

Guideline word count: 600 - 800 words

A.C. 1.2 - Evaluate the impact of verbal and non verbal communication skills on the achievement of objectives

A.C. 1.3 - Evaluate the impact of verbal and non verbal communication skills on the development of productive working relationships

A.C. 1.4 - Discuss how verbal and non verbal communication skills can be used to overcome difficult situations

Task 3:

Evaluate at least three different methods of presenting the results of consultancy interventions to clients.

Guideline word count: 300 - 600 words

A.C. 3.4 - Evaluate different methods of presenting results of consultancy interventions to clients

Word count is a Max of 2600 range 2000 – 2600 words

Unit 7030 (Top Up) - Managing consultancy interventions

Introduction

This unit is about understanding the consultancy cycle and the associated risks involved. It also covers the differences in approach and style that may be required for use in different situations.

Scenario

Learners may use their own employment context, or that of another organisation with which they are very familiar, to base their assignment. However, in the case that they are not able to do so, please use the below scenario: -

You are a senior manager, leading teams of consultants across a range of clients. You need to ensure that each team uses the appropriate approach for delivering a consultancy project that supports organisational objectives.

Task 1:

By referring to the consultancy cycle, you are asked to outline the strategies that you would develop to overcome the risks and challenges that may occur at each of the stages.

Guideline word count: 1,500 - 1,800 words

A.C. 1.3 - Develop strategies to overcome risks and challenges which may occur during an intervention

Task 2:

By referring to three specific interventions, outline the different styles and approaches that were used to successfully deliver interventions in line with organisational objectives.

Guideline word count: 500 - 800 words

A.C. 2.2 - Evaluate a range of approaches and styles that can be used by consultants in different interventions

Word count is a Max of 1100 range 850 – 1100 words

Unit 7031 (Top Up) - Tools and techniques for effective consulting

Introduction

This unit tests your awareness of, and ability to apply, a range of standard tools and techniques that can be used in consultancy work. It covers the intervention process from the establishment of client needs through the development of appropriate research strategies to understanding and selecting the tools and techniques which will be most beneficial to the situation.

Scenario

Learners may use their own employment context, or that of another organisation with which they are very familiar, to base their assignment. However, in the case that they are not able to do so, please use the below scenario: -

a). Imagine that you are considering setting up in business as an independent consultant.
b). Imagine that you have been asked to act as an internal consultant within your own large organisation.

Use whichever scenario is most applicable to you to explore and respond to the tasks set out below. Please state which scenario has been used.

Task 1:

Describe at least three different tools and techniques a consultant can use to define a client's needs and evaluate the pros and cons of each in a range of circumstances. Illustrate your answers with real life examples where possible.

Guideline word count: 300 - 450 words

A.C. 1.2 - Evaluate a range of tools and techniques a consultant may use in defining the client needs

Task 2:

Explain the contribution that creative thinking techniques can make when analysing data and knowledge in consultancy work.

Guideline word count: 150 - 200 words

A.C. 2.5 - Discuss the role of creative thinking in the analysis of data and knowledge

Task 3:

Discuss two or more approaches you could use to achieve an aim of ensuring that experiences and knowledge gathered during consultancy interventions are captured and retained for the benefit of future operations within your practice. Identify some of the difficulties and challenges this legacy building presents and what processes you might put in place to overcome these. Use practical examples where applicable.

Guideline word count: 400 - 450 words

A.C. 3.4 - Evaluate ways of leveraging operating experience and knowledge for the future benefit of the practice

Word count is a Max of 3500 range 3000 – 3500 words

Unit 7032 - Managing the business of consulting

Introduction

This unit is about the core activities involved in managing consultancy teams and practices. It incorporates effective promotion of the consultancy business, managing resources within the practice or department, and effective management of the team.

Scenario

Learners may use their own employment context, or that of another organisation with which they are very familiar, to base their assignment. However, in the case that they are not able to do so, please use the below scenario: -

a. Imagine that you are the manager of an independent consulting business.
b. Imagine that you are the manager of an internal consultancy department within a large organisation.

Use whichever scenario is most applicable to you to explore and respond to the tasks set out below. Please state which scenario has been used.

Task 1:

Discuss how you would develop, and set out clearly, customer focused value propositions either in response to client enquiries about your services, or proactively when seeking to attract clients. The inclusion of a framework example would be beneficial. Analyse the range of channels available to promote the consulting organisation, discussing the benefits and limitations of each, and identifying situations when it would be appropriate to deploy each of these, or when use of a combination of channels might be advantageous. You may find it helpful to produce this evaluation in a table format. Identify and discuss the factors that influence client buying decisions.

Guideline word count: 1,100 - 1,250 words

A.C. 1.1 - Develop clear, customer focused value propositions

A.C. 1.2 - Evaluate a range of channels for promoting the consultancy organisation

A.C. 1.3 - Discuss a range of factors that influence client buying decisions

Task 2:

Identify the various resources and costs that might be needed to meet the objectives of a consultancy project. Describe the factors you need to take into account when pricing consultancy intervention, explaining the relevance of each factor. Discuss how you would develop suitable controls to ensure the project and resources were managed effectively, and provide examples of what these controls might be.

Where possible use a practical example from consultancy projects in which you have been involved.

Guideline word count: 650 - 750 words

A.C. 2.1 - Explain the factors to consider when pricing interventions

A.C. 2.2 - Identify the resources and costs needed to meet set objectives

A.C. 2.3 - Develop appropriate controls to ensure effective management of resources

Task 3:

Describe different models of team structure that could be appropriate in a consultancy organisation or department, and how you would set about establishing the most suitable model for your own organisation, using a practical example or one of the above scenarios. Discuss how to balance the deployment of the human resources at your disposal in the most effective manner to ensure achievement of both organisational and consultancy project objectives, stating what challenges this might present.

Guideline word count: 400 - 500 words

A.C. 3.1 - Develop appropriate team structures to support the achievement of objectives

A.C. 3.2 - Deploy human resources effectively to meet set objectives

Task 4:

Describe the various tools and techniques available to build effective teams. Analyse how these tools and techniques might be deployed in a consultancy organisation, explaining some of the issues that may have to be overcome, and how implementation may differ from similar deployment in a more mainstream organisation. Identify how your approach might need to be adapted for the audience. Discuss the challenges of leading teams of remote workers (e.g. based from home, or self employed), and those from the client team who are working as part of a 'virtual' consultancy project team.

Guideline word count: 850 - 1,000 words

A.C. 3.3 - Evaluate tools and techniques used to build effective teams

A.C. 3.4 - Discuss the challenges of leading teams which may be remote or contain client employees