

CMI LEVEL 5 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) Certificate and Diploma in Business Support the opportunity to achieve the updated qualifications, via a top up programme.

CMI have conducted a mapping exercise of the IC Certificate in Management Consulting Essentials qualification against these qualifications. From that mapping exercise, CMI have created six individual Assignment Briefs, for each of the units. Each assignment brief will set out tasks that the Learner is required to complete, in order to achieve the assessment criteria.

These assignments can be marked within the CMI Approved Centre, or sent to CMI for external verification, at a charge per unit per learner (please refer to price list).

TOP UP SUMMARY

Certificate in Management Consulting Essentials

Learners who have previously been awarded the Certificate in Management Consulting Essentials would have been required to complete the following units:

The Consultancy Role
The Consultancy Cycle
The Client Relationship
Communication for Consultants
Effective Project Delivery
Structured Knowledge, Research and Analysis

Top Up requirements for the CMI Level 5 Award in Professional Consulting

In order to be awarded CMI Level 5 Award in Professional Consulting, Learners are required to complete the Top Up Assignment Brief for the selected unit.

Rules of Combination for the CMI Level 5 Award in Professional Consulting

Learners must complete one unit to a minimum of 7 credits to achieve this qualification.

		Mandatory		
Unit Number	Unit Name		Level	Credits
5029	Introduction to consulting essentials		5	8
5030	Planning and managing consultancy interventions		5	8
5032	The Client relationship		5	8
5033	Communication for consultants		5	7
5034	Problem solving, tools and techniques for consultants		5	9

Top Up requirements for the CMI Level 5 Certificate in Professional Consulting

In order to be awarded CMI Level 5 Certificate in Professional Consulting, Learners are required to complete the Top Up Assignment Brief for the selected units.

Rules of Combination for the CMI Level 5 Certificate in Professional Consulting

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

		Mandatory		
Unit Number	Unit Name		Level	Credits
5029	Introduction to consulting essentials		5	8
5030	Planning and managing consultancy interventions		5	8
5031	The role and responsibilities of a consultant		5	8
5032	The client relationship		5	7
5033	Communication for consultants		5	9
5034	Problem solving, tools and techniques for consultants		5	9

Top Up requirements for the CMI Level 5 Diploma in Professional Consulting

In order to be awarded CMI Level 5 Diploma in Professional Consulting, learners are required to complete the Top Up Assignment Briefs for all mandatory units plus either complete the Top Up Assignment Brief for units 5029, 5031 or 5033 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 5 Diploma in Professional Consulting

Learners must complete all mandatory units to a total of 25 credits and three optional units to a minimum of 18 credits to achieve this qualification.

Mandatory				
Unit Number	Unit Name		Level	Credits
5029	Introduction to consulting essentials		5	8
5030	Planning and managing consultancy interventions		5	8
5032	The Client relationship		5	8
Optional				
Unit Number	Unit Name		Level	Credits
5029	Introduction to consulting essentials		5	8
5031	The role and responsibilities of a consultant		5	6
5033	Communication for consultants		5	7
5009V1	Project development and control		5	6
5017V1	Coaching practice theory		5	6
5019V1	Management of action learning		5	6
6003V1	Planning the change process		6	7

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 is 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 (please refer to price list).

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 CMI Quality Manager and CMI.

UNIT 5029 – INTRODUCTION TO CONSULTING ESSENTIALS

Word count is a Max of 600 range 400 – 600 words

Introduction

This unit is about the nature of consultancy and development of the skills, knowledge and behaviours required in order to present a professional consultancy practice. It is also about the appropriate deployment of effective communication methods in a consultancy role.

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 one of the below scenarios: -

- a). Imagine that you are considering setting up in business as an independent consultant.
- b). Imagine that you have been asked to act as a consultant conducting work 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:

Identify at least three different situations when organisations may find it helpful to use the services of a consultant, explaining how a consultant can add value to the client organisation.

Explain why it is important for a consultant to adopt reflective practice as part of their development activity.

Guideline word count: 400 - 600 words

A.C.1.2 Explain how a consultant can add value to a client organisation

A.C.2.4 Explain the importance of reflective practice in developing oneself as a consultant

UNIT 5030 – PLANNING AND MANAGING CONSULTANCY INTERVENTIONS

Word count is a Max of 800 range 500 – 800 words

Introduction

This unit is about you being able to demonstrate an understanding of how to plan and manage consultancy interventions using both the consulting cycle and project management techniques. It is also about being able to conduct and conclude a consultancy intervention.

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 one of the below scenarios: -

- a). Imagine that you are considering setting up in business as an independent consultant.
- b). Imagine that you have been asked to act as a consultant conducting work 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:

Identify the infrastructure required to deliver the project. Critically appraise the role of the project leader in quality assuring the work of the team.

Guideline word count: 300 – 500 words

A.C.2.4 Identify an appropriate infrastructure to support project delivery

A.C.2.6 Evaluate the importance of the project leader quality assuring the work of the project team

Task 2:

Explain how to use the findings from the project work to develop sound conclusions and the process of developing recommendations, showing that you understand the principles of good management report writing.

Guideline word count: 200 - 300 words

UNIT 5031 – THE ROLE AND RESPONSIBILITIES OF A CONSULTANT

Word count is a Max of 800 range 500 – 800 words

Introduction

This unit is about the role of the consultant and the behaviours, skills attributes and responsibilities required.

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 the manager of a business area within an industry area of your choice and are asked to review the organisational policy for recruiting consultants working for your organisation.

Task 1:

For your organisation, describe two organisational structures that could be used when initiating consultancy work programmes.

Describe how the role of a consultant changes throughout their career by providing practical work-based examples. Explain the changes to the competencies required of a consultant throughout their career.

Guideline word count: 400 - 600 words

A.C. 1.1 Identify different types of organisational structures for consulting practices/departments

A.C. 2.1 – Explain how the competencies required of a consultant change at different stages of their career

Task 2:

Provide three examples of ethical dilemmas that may arise whilst working as a consultant. Outline the duty of care that consultants need to provide to clients within your industry area.

Guideline word count – 350 – 500 words

A.C. 3.2 Identify ethical dilemmas that may arise in the course of the work of a consultant

A.C. 3.3 Explain the duty of care owed by a consultant to a client

UNIT 5032 – THE CLIENT RELATIONSHIP

Word count is a Max of 1700 range 1200 – 1700 words

Introduction

This unit is about understanding how a client/ consultant relationship is forged and developed in a positive way and the skills required of a consultant in order to gain the trust of clients.

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 the manager of a business area within an industry area of your choice and are asked to review how the effectiveness of client/consultant relationship within your organisation.

Task 1:

You are asked to outline how your organisational policies and procedures influence the effectiveness of the client/consultant partnership within your organisation. Prepare a report for the management team where you address the following tasks:

- Outline the organisational structure within your organisation and evaluate its impact on the client/consultant relationship
- Assess the impact of the client/consultant relationship on the success or otherwise of consultancy interventions
- Outline the measures that are in place within your organisation to monitor client/consultant relationships and produce a plan that can help to reduce or minimise potential conflicts in this relationship.

Guideline word count: 800 - 1100 words

A.C. 1.1 - Evaluate the impact different organisational structures and processes have on the client/consultant relationship

A.C. 1.3 - Assess the impact that client/consultant relationships have on consultancy interventions

A.C. 2.4 - Explain the common causes of breakdown in the client/consultant relationship and the means by which these can be monitored

A.C. 2.5 - Devise a plan to minimise potential conflicts in the client/management consultant relationship

Task 2:

For your business area, identify and evaluate three tools and techniques that would help your organisation to identify the needs of both clients and key stakeholders involved with your organisation in developing successful working relationships.

By referring to an example within your business area, list up to four influencing techniques that are used by consultants to ensure that the client implements the intervention recommendations.

Guideline word count: 400 - 600 words

A.C. 2.1 - Evaluate tools and techniques which may be used to identify the needs of clients and key stakeholders

A.C. 3.3 Explain how the consultant may use influencing skills to ensure the intervention recommendations are implemented by the client

UNIT 5033 – COMMUNICATION FOR CONSULTANTS

Word count is a Max of 1400 range 1200 – 1400 words

Introduction

This unit demonstrates the skills required of a management consultant using verbal and non-verbal communication methods.

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 the manager of a business area within an industry area of your choice and are asked to review the importance effective communication has on the client/consultant relationship within your organisation.

Task 1:

Produce a guideline document to be used by consultants in preparing for meeting new clients. Within your report, you need to:

- Evaluate the importance of using questioning and listening techniques during meetings
- Outline the different formats and types of meetings required during the sales and delivery cycles of the consulting process.

Guideline word count: 300 - 400 words

A.C. 2.3 - Evaluate the importance of the consultant employing questioning and listening skills during the meeting

A.C. 2.4 - Identify the different types and formats of meetings during the sales and delivery cycles of consulting

Task 2:

Produce a report for consultants who are preparing to deliver presentations and reports to new clients. Within your report, you need to address the following:

- Explain the key principles involved in delivering an effective presentation and evaluate the effectiveness of using presentations when communicating to clients
- Outline four tools and resources that could be used when communicating with clients to ensure the desired message is conveyed
- Describe the key components of a report and outline how to ensure they are effective.
- Explain and illustrate how two different writing styles can be used within report writing

Guideline word count: 900 - 1000 words

A.C. 3.1 - Explain the key principles of delivering a presentation which meets its objectives

A.C. 3.2 - Evaluate the use of presentations as a method of communicating information to clients

A.C. 3.3 - Identify the tools and resources a consultant may use to convey the desired message

A.C. 3.4 - Prepare effective written reports

A.C. 3.5 - Identify the different writing styles which may be used and match these two different situations

UNIT 5034 – PROBLEM SOLVING TOOLS AND TECHNIQUES FOR CONSULTANTS

Word count is a Max of 2400 range 1950 – 4400 words

Introduction

This unit is about the tools and techniques used by a consultant to select and analyse data and information and to formulate findings and alternative courses of action for the client.

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 the manager of a business area within an industry area of your choice and are asked to review how problems solving techniques can be used when developing effective client/consultant solutions for your organisation.

Task 1:

Prepare a report for newly recruited consultants where you complete the following tasks:

- Outline the tools and approaches available to a consultant within your organisation that can be used when establishing the nature of the client issue.
- Highlight the implication on the effectiveness of the intervention if the consultant has not correctly assessed or understood the client needs.
- Outline the importance of confidentiality when working closely with clients and having access to specific client information.

Guideline word count: 700 - 900 words

A.C. 1.1 - Evaluate the tools and approaches a consultant may employ to identify the client issue

A.C 1.2. Assess the impact on the intervention if the consultant does not fully understand the needs of the client

A.C. 2.3 - Explain the importance of confidentiality when dealing with client information

Task 2:

Evaluate at least three analytical tools, techniques or models that are currently used by consultants. Wherever possible use practical work based examples to illustrate your answers

Demonstrate how tools and techniques are used to evaluate findings and draw conclusions that enable consultants to determine options available for their clients and meet their needs effectively.

Assess the risks to the client of adopting an alternative course of action using analytical techniques so that clients are well informed.

Guideline word count: 1250 - 1500 words

A.C. 3.1 - Evaluate a range of analytical tools, techniques and models that can be used by consultants

A.C. 3.2 - Select appropriate analytical tools, techniques and models to meet the needs of a consultancy intervention

A.C. 3.3 Evaluate findings and draw conclusions following analysis

A.C. 3.4 - Determine options to address the needs of the client

A.C. 3.5 Assess risks to the client of adopting alternative course of action