

# THE COMMON BODY OF KNOWLEDGE

INSTITUTE OF MANAGEMENT CONSULTANTS USA, INC.

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# IMC USA CODE OF ETHICS

Approved by the Board of Directors  
February 5, 2005

All IMC USA members pledge in writing to abide by the Institute's Code of Ethics. Their adherence to the Code signifies voluntary assumption of self-discipline.

As the professional association and certifying body for management consultants in the United States, IMC USA requires adherence to this Code of Ethics as a condition of membership and certification. The standards of conduct set forth in this Code provide basic principles in the ethical practice of management consulting. The purpose of this Code is to help IMC USA members maintain their professionalism and adhere to high ethical standards in the conduct of providing services to clients and in their dealings with their colleagues and the public. The individual judgment of Members is required to apply these principles. Members are liable to disciplinary action under the IMC USA Rules of Procedure for Enforcement of this Code if their conduct is found by the IMC USA Ethics Committee to be in violation of the Code or to bring discredit to the profession or to IMC USA.

## ***My Commitment to My Clients***

- 1.0 I will only accept assignments for which I possess the requisite experience and competence to perform and will only assign staff or engage colleagues with the knowledge and expertise needed to serve my clients effectively.
- 2.0 Before accepting any engagement, I will ensure that I have worked with my clients to establish a mutual understanding of the objectives, scope, work plan, and fee arrangements.
- 3.0 I will treat appropriately all confidential client information that is not public knowledge, take reasonable steps to prevent it from access by unauthorized people, and will not take advantage of proprietary or privileged information, either for use by myself, the client's firm, or another client, without the client's permission.
- 4.0 I will avoid conflicts of interest or the appearance of such and will immediately disclose to the client circumstances or interests that I believe may influence my judgment or objectivity.
- 5.0 I will offer to withdraw from a consulting assignment when I believe my objectivity or integrity may be impaired.
- 6.0 I will avoid conflicts of interest or the appearance of such and will immediately disclose to the client circumstances or interests that I believe may influence my judgment or objectivity.
- 7.0 I will offer to withdraw from a consulting assignment when I believe my objectivity or integrity may be impaired.
- 8.0 I will refrain from inviting an employee of an active or inactive client to consider alternative employment without prior discussion with the client.

<p><b><i>My Commitment to Fiscal Integrity</i></b></p>	<p>9.0 I will agree in advance with a client on the basis for fees and expenses and will charge fees that are reasonable and commensurate with the services delivered and the responsibility accepted.</p> <p>10.0 I will not accept commissions, remuneration, or other benefits from a third party in connection with recommendations to a client without that client's prior knowledge and consent, and I will disclose in advance any financial interests in goods or services that form part of such recommendations.</p>
<p><b><i>My Commitment to the Public and the Profession</i></b></p>	<p>11.0 If within the scope of my engagement, I will report to appropriate authorities within or external to the client organization any occurrences of malfeasance, dangerous behavior or illegal activities.</p> <p>12.0 I will respect the rights of consulting colleagues and consulting firms and will not use their proprietary information or methodologies without permission.</p> <p>13.0 I will represent the profession with integrity and professionalism in my relations with my clients, colleagues, and the general public.</p> <p>14.0 I will not advertise my services in a deceptive manner nor misrepresent or denigrate individual consulting practitioners, consulting firms, or the consulting profession.</p> <p>15.0 If I perceive a violation of this Code, I will report it to the Institute of Management Consultants USA and will promote adherence to this Code by other member consultants working on my behalf.</p>

## CONSULTANCY: A BRIEF HISTORY AND CURRENT PURPOSE

It is important for CMCs (Certified Management Consultants) to have a working appreciation of the historical antecedents of the profession, which closely follows the evolution of general management thinking.

Some aficionados of consulting history delight in tracing its origin to Aaron, the brother of and adviser to Moses, which emphasizes the need for wisdom, counsel and guidance being available to those in responsible leadership positions.

In practical present day terms, it is necessary for practitioners to be aware of the roots of contemporary business improvement initiatives in the 'scientific management' inquiries of the early Industrial Revolution, when pioneers such as Frederick Winslow Taylor at the Bethlehem Steel Works sought productivity enhancements through measurement and management of the sub-elements of the workers' tasks. This tradition can be traced through the work of the Gilbreths and the wartime munitions performance management lessons, and the post-war productivity improvements of Deming, Juran and the latter day Quality Movement. The influence of military developments on subsequent civilian endeavors cannot be overestimated.

This is also true of the second wave of management thinking and consulting developments: the Human Relations tradition, which dates back to Elton Mayo and the Bank Wiring Observation Room and Relay Assembly Test Room Experiments at the Hawthorne Electric Plant of the General Electric Company. Mary Parker Follett is often seen as the Mother of this school of thought, which has always been in a state of dynamic tension with the scientific management tradition.

These two traditions, respectively, build upon the focus on the task and the human process in industry business endeavours to achieve commercial results. The job of the general manager and the management consultant is to help draw those foci together in order that the eternal triangle - structure, task and people/process - is balanced for a successful business result. That is the core purpose of the consultant today, as it was through the whole history of the profession.

IMC USA was established in 1968 and is a member of the International Council of Management Consulting Institutes.

The following model expresses three dimensions of the competent consultant. The point reached in each category hinges very much on the experience gained over time. This recognizes that consultancies recruit at varying levels: from recently graduated students, to managers with years of experience moving into consultancy. What the model does not say is that the list of competencies is exhaustive or, for that matter, that a given consultant should be competent in all the areas outlined. What it does, is to delineate the competency territory within which consultants can develop in a myriad of ways.

In the same way, the CMC designation is only a stage in the professional development for the accredited consultant. A move to FCMC would thus require further evidence of competencies asked for at the time of CMC evaluation. The body of knowledge outlined here encompasses all these levels at a basic degree. It is up to the individual's curiosity and experience to take any aspect further through professional development.

As an overview, consultants should have knowledge, to an appropriate degree, in the following fields (details of each follow on subsequent pages).

<b>DEVELOPMENT OF CONSULTANCY</b>	<ul style="list-style-type: none"> <li>• Origins of consultancy</li> <li>• Important factors in its evolution</li> <li>• Current range and scope of consulting<sup>3</sup></li> <li>• Current trends</li> <li>• Future prospects for consultants and consultancy</li> </ul>
<b>CONSULTANCY AS A PROFESSION</b>	<ul style="list-style-type: none"> <li>• Knowledge of existing professional associations</li> <li>• Knowledge of current requirements established by ICMCI</li> </ul>

<b>DEFINITIONS</b>	
<i>Management Consulting</i>	is the provision of independent advice and assistance to clients with management responsibilities. This advice can take several shapes, as consultants can be external, internal and may take on one or more of a whole array of roles, including being an outsourced function for the client organization.
<i>Management Consultant</i>	is an individual who provides independent advice and assistance about the process of management to clients with management responsibilities. The individual can be a generalist or a specialist and may approach an assignment with, for example, a purely financial point of view, as required by the client.
<i>Certified Management Consultant</i>	- is a management consultant who views management consulting as a profession and has been evaluated as meeting certain requirements pertaining to character, qualifications, experience, independence and competence as defined by the professional body issuing certification.
<i>Certified Practice</i>	is an organization that, having been evaluated by IMC USA as providing training at a suitably high standard, can recommend employees for certification by IMC USA

## A. GROWTH IN CONSULTING COMPETENCE

Outlined here are the skills in which consultants should be competent. Tracking the stages of the client-consultant relationship is a useful guideline as to the generic path that assignments follow. As this process provides the most inclusive scenario in describing competencies critical to a successful engagement, it is a useful model. Clearly, certain projects may not require all elements. (e.g., Some may not require Phase 1 or 2 in a repeat business setting, due to the nature of the client, their needs or a previously established consulting relationship with the client.)

### • THE CLIENT-CONSULTANT RELATIONSHIP

<b>PHASE 1</b>	Key Points: <ul style="list-style-type: none"><li>• Marketing of services</li><li>• Exploring opportunities</li><li>• Impressing from first contact</li></ul>	This phase is the initial stage at which the consultant markets his/her services and explores market opportunities. Promotional activity will form an important part of this phase, and include direct methods such as telephone calls, mailing of promotional materials, or targeted Internet e-mail campaigns. This will eventually lead to the identifications of a client and the making of first contact. Currently, and increasingly so, the Internet is a powerful marketing tool that should be carefully considered as it can open many potentially fruitful markets. The consultant should impress the potential client by, among other things, his/her professionalism and track record.  Assuming there is a sense of compatibility and vision of success on behalf of both parties, the relationship will continue to develop. Direct methods will be needed less by those organizations with such a reputation that they would be sought out by the client rather than the converse. It is these organizations that typically benefit from a large proportion of repeat-business.
<b>PHASE 2</b>	Key Points: <ul style="list-style-type: none"><li>• Understanding the client</li><li>• Recognizing a client need</li><li>• Clarifying the client need</li><li>• Exploring potential for success of project</li><li>• Providing estimates and billing strategy</li></ul>	The continuing relationship will serve to explore the client's needs and further define them. The client and the consultant must come to some understanding on what the desired procedure and outcomes will be, although flexibility should be integral to the discussions. The desired outcomes will generally revolve around the concept of a real added value to the bottom line, i.e., a measurable difference. This stage will culminate with a formal proposal from the consultant that delineates some idea of time scope and fees. Equally important will be a demonstrated understanding of the client's political, economic, social, technological, legal, environmental situation as they relate to the projected outcome of the consulting engagement

<b>PHASE 3</b>	<p>Key Points:</p> <ul style="list-style-type: none"> <li>• Selecting method of intervention</li> <li>• Isolating the problem</li> <li>• Understand scope of problem</li> <li>• Exploring client's readiness for change</li> <li>• Hypothecating</li> <li>• Interviewing</li> <li>• Exercising fact-finding methods</li> <li>• Applying analytical methods</li> <li>• Applying diagnostic tools</li> <li>• Identifying benefits</li> <li>• Dealing with client managers</li> </ul>	<p>Once an agreement has been reached, the consultant will explore which method of intervention would best fit the situation. Among the choices would be roles ranging from reflector, through collaborator, to advocate. Note that the interpretation of the consultant as a shadow director should be avoided at all times. A modern trend, though, is the utilization of the consultant as an outsourced function, reflecting the implied need for organizations to streamline operations. This phase implies exploring the client's readiness for change. The client may be an individual, but the effects will be felt by the whole organization. It will be important to manage relationships with key individuals and recognizing who the particular dissidents might be. Interviews, fact-finding procedures, diagnostic and analytical methods to assess the company's position will become important at this point. Eventually, this should lead to a clearer delineation of the problem and the task at hand that could formulate the basis for a hypothesis. Benefits will be identified and range from strategic guidance and direction, to greater competitiveness, to the identification of market opportunities.</p>
<b>PHASE 4</b>	<p>Key Points:</p> <ul style="list-style-type: none"> <li>• Applying solution development methods</li> <li>• Validating recommendations</li> <li>• Implementing</li> <li>• Relating back to expectations</li> <li>• Applying contingency plans (if necessary)</li> <li>• Evaluating</li> <li>• Closing</li> </ul>	<p>A plan for resolution will begin to emerge and the consultant may begin to prepare a set of recommendations. These can be derived from brainstorming sessions, linear problem solving or lateral thinking, among other means. This will need to be validated, requiring an understanding of the client's values and objectives, as well as its culture. Rarely will an assignment succeed if it is not supported by, at least, the most senior people. Increasingly, consultants are finding that their recommendations will also require implementation. This latter stage requires many different skills that may force the consulting team to change somewhat by introducing members to the organization who are more experienced and better equipped to manage specific outcomes. It is also during this stage that evaluations will be scheduled to monitor progress of implementation and, if necessary, introduce contingency tactics. The project will have come to an end. This phase will include specific steps to be taken to achieve, and document, proper closure.</p>
<b>PHASE 5</b>	<p>Key Points:</p> <ul style="list-style-type: none"> <li>• Maintaining the relationship</li> </ul>	<p>Finally, the consultant must never forget that the end of a project does not signify the end of the relationship. It is much less expensive to handle assignments on a repeat business basis than it is to be continually marketing oneself and trying to attract new clients. The maintenance of the relationship is extremely important, both for the consultant and the client. (A key point noted in Phase 1, above).</p>
<b>PHASE 6</b> <b>EFFECTIVENESS</b> <b>IN CONSULTING</b>	<p>Key Points:</p> <ul style="list-style-type: none"> <li>• Diagnostic ability</li> <li>• Solution and implementation skills</li> <li>• General and specialized knowledge as defined in PESTLE and Management communication skills</li> <li>• Managerial skills</li> <li>• Marketing and selling skills</li> </ul>	<p>The numerous factors that lead to potential effectiveness in consulting can be enhanced as much as they can decay. It is assumed that a good education is the basic building block of much that the consultant will be capable of. Also of great importance will be the Continuous Professional Development (CPD) undertaken by the individual. Many of the large practices generally have their own training programs that serve this very purpose. Many consultants also 'swing back and forth' between consulting and industry and thus continue to learn. But, it is of paramount importance for a sole practitioner to invest in CPD for his/her own benefit, as well as that of the client.</p>

## B. MANAGEMENT/ORGANIZATIONAL COMPETENCE BREADTH

The following are core managerial activities in which consultants should be competent. They are equally as important for understanding a client's activities as they are for consultants to manage their own teams. Clearly, in the latter case, some of what is outlined below may not apply unless the consultant is acting as a team leader or more senior member of the team.

<b>PLANNING</b>	<p>Key Points:</p> <ul style="list-style-type: none"> <li>• Assessments of demands and needs</li> <li>• Setting corporate (or consulting) objectives and targets</li> <li>• Communicating</li> <li>• Setting business controls</li> <li>• Using management information systems</li> <li>• Human resource planning</li> </ul>	<p>This is the initial stage in a process that will eventually achieve an objective. It is the stage at which assessments of needs and demands must be made. In relation to these factors, the planner must understand the future state desired by the client and, thus, visualize the structure of the team and the project to meet that objective. This will be set out in a plan that will also define how the components will be organized, led, controlled and directed in order to achieve maximum benefit to the client and the consulting organization. Communication is therefore imperative, regardless of whether the planning is strategic, tactical, operational or project in nature.</p>
<b>ORGANIZING</b>	<p>Key Points:</p> <ul style="list-style-type: none"> <li>• Setting objectives and targets</li> <li>• Human resource organizing</li> <li>• Delegating</li> <li>• Influencing</li> <li>• Time management</li> </ul>	<p>This step normally follows the planning phase. The consultant systematically allocates resources against specific tasks or activities. These will be in accordance with clearly identified objectives and targets. Success of this process, therefore, relies on crucial time management. Organizing requires clear delegation skills and, at times, the ability to influence others, in order to ensure accomplishment of a common goal.</p>
<b>LEADING</b>	<p>Key Points:</p> <ul style="list-style-type: none"> <li>• Styles: directive vs. 'light hand on the wheel'</li> <li>• Influencing</li> <li>• Inter-personal skills</li> <li>• Intra-personal skills</li> <li>• Communicating</li> <li>• Motivating</li> <li>• Directing</li> </ul>	<p>Leadership is necessary for the successful accomplishment of any group-driven task. This ability provides the impetus for the rest to strive for the common goal. It requires a great deal self-awareness and certainty to enable the leader to motivate, persuade, communicate and direct according to his/her convictions. Just as important, the leader must be able to match the "person to the task" to maximize effectiveness of the team. There are different styles that range from the 'light hand on the wheel' to the more directive approach. It is important to know when to employ which. A wise man once noted the "...there are no limits to what a man might achieve, if he does not care whose gets the credit..."</p>
<b>CONTROLLING</b>	<p>Key Points:</p> <ul style="list-style-type: none"> <li>• Regulating objectives</li> <li>• Monitoring plans, policies and procedures</li> <li>• Delegating responsibilities</li> <li>• Measuring and reviewing performance</li> <li>• Taking corrective action</li> <li>• Using Management Information Systems</li> </ul>	<p>Continual monitoring of progress is vital to ensure that the engagement direction continues to be appropriate. The establishment of clearly defined metrics provides the consultant with tools to measure the progress of the engagement. The consultant uses these metrics to ensure the client's needs are being met by the project team. (The use of Management Information Systems (MIS) is particularly effective for this, as statistics are a powerful tool for the measurement of performance.) Regularly scheduled review sessions provide a useful mechanism to communicate progress with the team and client, and to redirect activities, if required.</p>



<b>DIRECTING</b>	<p>Key Points:</p> <ul style="list-style-type: none"> <li>• Defining corporate (or project) vision</li> <li>• Defining corporate/strategic values</li> <li>• Determining strategic (or tactical) choices</li> </ul>	<p>Seeing the “Big Picture” requires the consultant thoroughly incorporate the client’s desired end state in every step of the engagement process. It involves the adoption of a strategic point of view. The consultant must ensure that each activity supports the corporate values, to avoid disruptive behavior or events that would detract from achieving the overall goal. Bear in mind that a client expects the consultant to solve problems, rather than initiate them. The consultant should act with the best interests of his/her client in mind.</p> <p>The following are managerial processes consultants should be aware of, to varying degrees of depth and breadth depending on the project. Projects may be highly specific requiring a specialist’s perspective, but it may also be highly strategic in nature, in which case broader knowledge of these items would be beneficial. Some may even apply, specifically, to the management of consulting work:</p>
<b>ORGANIZATIONAL ANALYSIS</b>	<p>Key Points:</p> <ul style="list-style-type: none"> <li>• Understanding organizational structures</li> <li>• Measuring organization performance</li> <li>• Evaluating the mission statement and comparing with core values and purposes</li> </ul>	<p>This is a process of management that aims at understanding what the organization’s structure is, as well as how the measurement of its performance is accomplished. Clear definition of the goals of the organization and how it is structured to achieve those goals must be considered to ensure mutual agreement on the “deliverables” of the engagement. In some cases, it may be necessary to utilize alternate metrics to ensure objective review of organizational performance. Outcomes should be compared to the mission statement of the organization and rated according to appropriateness.</p>
<b>ORGANIZATIONAL DEVELOPMENT</b>	<p>Key Points:</p> <ul style="list-style-type: none"> <li>• Establishing need for change</li> <li>• Team building</li> <li>• T-groups</li> <li>• Force-field analysis</li> </ul>	<p>Given a completed Organizational Analysis process, the organization either carries forward the current strategy or implements a more appropriate one according to need. The Development process incorporates the desired vision, current cultural and environmental constructs, defined midpoints towards the vision and external modifiers to produce a clearly understood path forward. This is a perpetual process that occurs due to the dynamic nature of markets, technologies and, therefore, challenges to achieving success as an organization. It may, or may not, involve a paradigm shift in the organization and the consultant must avoid personalizing the process to integrate themselves as part of the long-term organizational change.</p>

<b>PROJECT/PROCESS MANAGEMENT</b>	<p>Key Points:</p> <ul style="list-style-type: none"> <li>• Client focus</li> <li>• Simple vs. complex teams</li> <li>• Identifying intended outcomes</li> <li>• Identifying expected outcomes</li> <li>• Time management</li> <li>• Scheduling techniques</li> <li>• Setting milestones</li> <li>• Maintaining documentation</li> <li>• Reporting</li> <li>• Managing the end of the project: Closure</li> <li>• Management Information Systems</li> <li>• Budgeting and financial control</li> </ul>	<p>There should always be a strong client focus in an engagement. “Mile-stone”-ing and time management techniques will be of utmost importance. The use of Gantt charts and similar applications are recommended, especially in complex assignments, when more advanced techniques such as the Program Evaluation and Review Technique (PERT) or Critical Path Method (CPM) might be useful tools. Teams can also be complex and it is necessary for the individual members to have reached a uniform understanding of purpose and objective. MIS tools will benefit any project, as an aid in the meaningful selection and representation of data: financial, performance, or otherwise. Other important aspects to consider are the timing and format of reporting procedures and the management of the project’s closure. If possible, the client is best served if the consultant can employ tools that mirror the client’s reporting mechanisms. The consultant should avoid confusing the client with tools that require a paradigm shift in the client’s analysis of critical performance data.</p>
<b>CHANGE MANAGEMENT</b>	<p>Key Points:</p> <ul style="list-style-type: none"> <li>• Understanding the nature of change</li> <li>• Identifying change</li> <li>• Internalizing change</li> <li>• Application of different approaches</li> <li>• Leadership</li> <li>• Innovation</li> <li>• Experimentation</li> <li>• Openness</li> <li>• The change agent</li> <li>• Communicating</li> </ul>	<p>All consulting assignments, to some degree, involve the management of change. The nature of change lies in nature itself; it is the most basic function of any kind of development. What has augmented the rate of and nature of the complicated change is basically attributable to technology. Organizational change occurs because it is either reactive or proactive to the surrounding forces that can be summed up by the umbrella term ‘environment’. The management of change requires accurate appraisal of what change is required, who and what will be involved, and the presence of effective leaders who can innovate and experiment with full use of communication skills and open approaches. People must identify with and internalize the meaning of a change if it is to succeed in the long run. It is crucial for the consultant to actively identify, engage and – if necessary – convert internal supporters for the change. The consultant must know who, in the organization, will carry on the change after the consultant is gone.</p>
<b>STRATEGY</b>	<p>Key Points:</p> <ul style="list-style-type: none"> <li>• Innovation</li> <li>• Regeneration</li> <li>• Directing</li> <li>• Leading</li> <li>• ‘Re-inventing the future’</li> </ul>	<p>Strategy as a process of management is the continuous eye on the future opportunities and threats to what an organization is to achieve. Strategy is about innovating, directing and moving an organization forward: ‘re-inventing the wheel’. Consultants aid with strategic focus because they are lateral thinkers and are often more capable of interpreting the future by careful observation of the client, competitors and markets at present. One of the crucial benefits a consultant can bring is the ability to translate successful previous engagements from seemingly unrelated situations into meaningful advice to a new client.</p>

### C. DEPTH IN SPECIALIST TECHNICAL/PROFESSIONAL SKILLS

Most consultants enter the professional practice of consultancy through the route of functional specialism such as marketing, finance, HR, or production. Some remain deep specialists, either in an organizational function or process; or in the methodologies and applications of a particular proprietary philosophy or approach. Others rely more on greater management breadth in organizational competency ('B' above), but all must be able to relate their deep technical professional expertise to the client organization. As a tertiary level qualification, the CMC does not test for expertise in functional specialisms, although it does require evidence of having obtained the necessary level of competency, frequently through the qualifications and CPD of a recognised professional body, such as the Institute of Chartered Accountants, Marketers and HR in the member countries.

Specialist competencies are important because they reflect the fragmented consulting market that exists today. Specialist competencies are a consultant's entry point upon which they can build professional depth. Consultants range from the stereotypical McKinseyite, with a general management approach, to the specialist IT consultant or senior executive facilitator and coach. They all require core competencies that form a part of every consultant worth his/her salt, but a specialist approaches require special knowledge without which the client will remain unimpressed or underserved. They expect the firm to do training, as would be the case when engaging a consulting team with several junior associates. The specialization can be broadly categorized as either functional or sectoral.

<b>FUNCTIONAL</b>	<ul style="list-style-type: none"><li>• - IT</li><li>• - HR</li><li>• - Management communication</li><li>• - Strategic planning</li><li>• - Production</li><li>• - Marketing</li></ul>
<b>SECTORAL</b>	<ul style="list-style-type: none"><li>• - Financial</li><li>• - Governmental</li><li>• - Charitable</li><li>• - Public</li><li>• - Private</li><li>• - Internal</li></ul>

## D. UNDERLYING UNDERSTANDING OF PESTLE

Knowledge of the political, economic, social, technological, legal and environmental situation is imperative for a successful consulting intervention. These macro-forces act upon an organization and shape its strategic and operational approaches in order to be successful. This implies that these forces will also shape how the consultant will have to intervene to help the client-organization achieve its success.

<b>POLITICAL</b>	<p>Key Points:</p> <ul style="list-style-type: none"> <li>• National</li> <li>• Organizational</li> <li>• Industrial relations</li> <li>• Influencing and lobbying</li> </ul>	<p>When considering political structures and forces, the consultant must be aware of national and organizational politics, to mirror the growth in international consulting. Nations have different forms of politics, different agendas, much in the same way as individuals struggle for control, power, promotion, etc within an organization. Understanding how their client “fits” into its political environment is crucial in enabling the consultant to provide meaningful and actionable advise.</p>
<b>ECONOMIC</b>	<p>Key Points:</p> <ul style="list-style-type: none"> <li>• Macroeconomic factors</li> <li>• Microeconomic factors</li> <li>• Market wealth</li> <li>• Resource allocation</li> </ul>	<p>Macro factors affect inflation, unemployment, exchange rates, trade balances, etc. Micro factors affect supply and demand, competition, the labor market and wages, amongst many others. Market wealth is an important consideration, as it will determine the possibility for growth. Being able to integrate a cogent engagement plan with those factors, including allocation of scarce resources, is key to the consultant’s credibility and performance.</p>
<b>SOCIAL</b>	<p>Key Points:</p> <ul style="list-style-type: none"> <li>• National culture</li> <li>• Organizational culture</li> <li>• Ethical culture</li> <li>• Business ethics</li> <li>• Inter-personal and</li> <li>• Intra-personal capabilities</li> </ul>	<p>It is under this heading that national as well as organizational culture fits. Failure to recognize that culture is the core of who people are, will lead to inaccurate understanding of the problem, its scope and the best consulting approach. High levels of interpersonal as well as intrapersonal skills are called upon to understand and best handle social differences. Culture encompasses all that is intangible in the form of people’s values, beliefs, tradition, language and taboos, as well as organizational ethics. It is important for a consultant to gain exposure to different cultures and thus become conscious at one level and tolerant at another.</p>
<b>TECHNOLOGICAL</b>	<p>Key Points:</p> <ul style="list-style-type: none"> <li>• Awareness</li> <li>• Needs, wants and possibilities</li> <li>• Infrastructure</li> <li>• Communications</li> </ul>	<p>This is undoubtedly one of the greatest drivers of the future, as it has enabled cultures to merge business and communications to become more powerful, efficient and global. For the organization, this has meant being able to locate anywhere in the world; transfer funds from any one place to any other in real-time; restructure to focus on core tasks and outsource the rest. Telecommunications are now practically real-time. The Internet allows instant access to a low-cost wealth of information. E-mailing is commonplace and much quicker than standard mail. These are just a few of the social and economic benefits that have affected nations and organizations through technology. The trend will continue as organizations handle ever more complexity and volume... The consultant provides value by keeping the client abreast of new developments, applications and potential new opportunities available, using the new technologies.</p>

<b>LEGAL</b>	<p>Key Points:</p> <ul style="list-style-type: none"> <li>• National</li> <li>• Organizational</li> <li>• Industrial relations</li> <li>• Influencing and lobbying</li> </ul>	<p>Laws are formal rules and procedures that define the appropriate behavior of a particular society or organization. There are many laws at national level that play an important part for businesses such as anti-trust legislation and corporate taxation, incentive grants and allowances. Similarly, there are very specific rules that are applied to certain types of organizations. For example, non-profit making institutions, function within very specific and very different legal parameters than those of the “for-profit” organization It is important for the consultant to be aware of legal environmental nuances between nations and sectors in industry when engaging a particular assignment to ensure sound advice is given. The consultant must scrupulously avoid providing inappropriate or inaccurate advise to their client. In most instances, the consultant should provide documentation of what is known as E&amp;O (Errors and Omission) Insurance, to protect both the consultant and the client in the event of unforeseen problems.</p>
<b>ENVIRONMENTAL</b>	<p>Key Points:</p> <ul style="list-style-type: none"> <li>• National</li> <li>• Organizational</li> <li>• Industrial relations</li> <li>• Influencing and lobbying</li> </ul>	<p>There are environmental considerations for the consultant to bear in mind when engaging in an assignment. There are strict rules that organizations need abide by in order to protect the environment from damage and these may prevent the implementation of a potential solution. Organizations and consultants have a responsibility to safeguard the environment, which falls within social and business ethics</p>

## E. UNDERLYING ACT ABILITIES

Acting, communicating and thinking are inherent personal abilities, or competencies, that we have at our disposal, but that a consultant must strive to refine through experience.

<p><b>ACTING</b></p>	<p>Key Points:</p> <ul style="list-style-type: none"> <li>• Professional attitude/behavior</li> <li>• Professional conduct/ethics</li> <li>• Dealing with client culture</li> <li>• Managing conflict</li> <li>• Motivating and developing people</li> <li>• Leading</li> <li>• Facilitating</li> <li>• Mentoring</li> <li>• Coaching</li> <li>• Selecting appropriate role</li> </ul>	<p>There exist multitudes of ways in which a consultant may act: objective observer, fact finder, coach, technical expert, etc. They should all be according to professional and ethical norms of attitude and behavior. It is important for a consultant not to over-stretch and try to be all things to all people. There are certain criteria to consider when selecting which guise to adopt: the client culture; the consultant's knowledge, experience and personality; the nature of the problem that the consultant has been called in to deal with. Facilitating, mentoring and coaching are three distinct options available to the consultant in order to motivate and develop people, but there are many more – and within each of these exist types of (e.g.) facilitating. It is important to consider that although different forms of acting are at a person's disposal quite naturally, the consultant should aim at refining them through experience and conscious efforts. The management of conflict is a good example of when different approaches may be validated in different circumstances by either stimulating or resolving the conflict to achieve a desired result.</p>
<p><b>COMMUNICATING</b></p>	<p>Key Points:</p> <ul style="list-style-type: none"> <li>• Written communications</li> <li>• Oral communications</li> <li>• Using available technology</li> <li>• Preparing proposals</li> <li>• Appropriate reporting</li> <li>• Enhanced presentations</li> </ul>	<p>There are two main ways of communicating: oral and written. It should be noted, however, that listening is another form of communication, as is body language. Each of these is an important element to the overall impression that a consultant will give. The tie with culture is inextricable as in some countries even a hand-gesture could be misinterpreted. Many clients may prefer regular oral communications rather than written reports, or conversely, might prefer to receive updates by email. These aspects of the relationship should be defined from the outset to minimize inconveniences. Nonetheless, consultants will need to know appropriate proposal and report-writing techniques and demonstrate good oral presentation techniques. Each should be properly adapted to the respective audience</p>
<p><b>THINKING</b></p>	<p>Key Points:</p> <ul style="list-style-type: none"> <li>• Empathizing</li> <li>• Lateral thinking</li> <li>• "Seeing the end from the beginning"</li> <li>• Contingency planning</li> <li>• Flexible approaches</li> </ul>	<p>It may seem obvious, but thinking is the single most important and fundamental competence that a consultant must be extremely good at. The consultant's mind should be capable of nurturing thoughts and ideas on several different planes simultaneously to enable flexible and contingent thinking. Lateral thinking and the ability to look into the future, 'to view the end from the beginning' are also important.</p>